Chapter 6

Person Administration

Table of Contents

General Information 1
Application Page/Navigation Tabs – Person Search 2
Application Page/Navigation Tabs – Person Admin 3
Secondary Navigation Tabs – Person Admin/Home 4
Secondary Navigation Tabs – Person Admin/Associates and Affiliations 5
Secondary Navigation Tabs – Person Admin/IDD Additional Info 6
Secondary Navigation Tabs – Person Admin/SED Additional Info 7
Creating a New Person - Overview 8
Completing a Search Prior to Creating Person 9
Create a New Person 10
Possible Duplicate Record Found 14
Adding Person Roles 17
Changing a Customer's Status 20
Alert 23
Add Address Information 24
Update Address Information 26
Person Aliases 28
Completed Person Admin/Home Page 30
Associates and Affiliations – Overview 31
Search for an Associate 33
Add an Associate (Existing Person) to a Customer Record 35
Add an Associate (New Person) to a Customer Record 38
Edit Associate Person Admin Information 43
Terminate an Associate and Customer Association 48
IDD Additional Info 52
SED Additional Info 54

General Information

Introduction	The Person Administration application is integrated into many of KDADS' other web applications to manage person information for that application. The Person Administration application stores demographic information, person roles, affiliations with other persons and other person-specific data. Depending on the role(s) assigned to the logged in user, additional tabs may display. This chapter will cover the use of Person Administration in KAMIS.
Background	All persons entered into KAMIS are located in the same Person Administration database table that is used by some of KDADS' other web applications. Because multiple roles can be assigned depending upon why the person is in KAMIS (customer, associate, assessor, case manager, etc.), there is no need to create a person more than once even if they serve multiple purposes in KAMIS (or any other web application.) There are security features in place that prevent users from accessing information they are not authorized to see.
Requirements	You must have the necessary security role for the Person Administration application, along with multiple roles specific to KAMIS that determine how much information you can see.
Application Pages	**Person Search** and **Person Admin** comprise the functional pages of Person Administration. KAMIS procedure requires looking up a person before creating the person record to avoid duplicate records whenever possible.

Application Page/Navigation Tabs – Person Search

Introduction

Because KAMIS procedure requires looking up a person before creating them, a Search navigation tab is provided on the Person Administration main page.

Person Search Page

The Person Search page is where search criteria are entered to determine whether a customer record already exists. Its function is to do a person search for matching customer records, display the results, and provide a link to create a new customer if they do not appear in the search results.

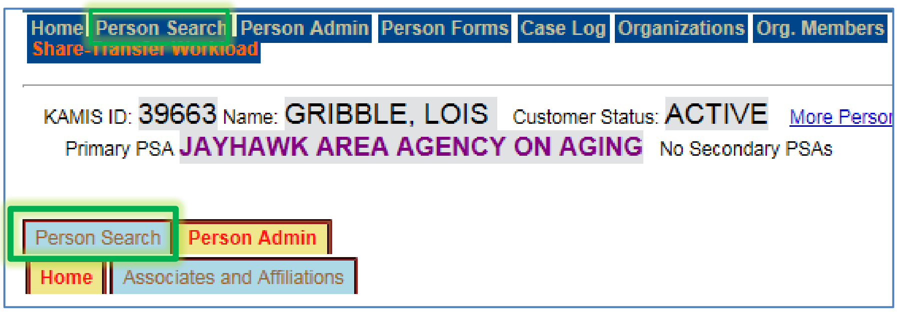
The Person Search page displays when you click on the Person Search button on the main navigation menu bar, or the Person Search tab on the Person Administration main page.

Important Note: Person Search only searches for customer records. Searches for associates and other non-customer person records are covered in separate documentation.

Navigation Menu Bar

OR

Person Administration Page



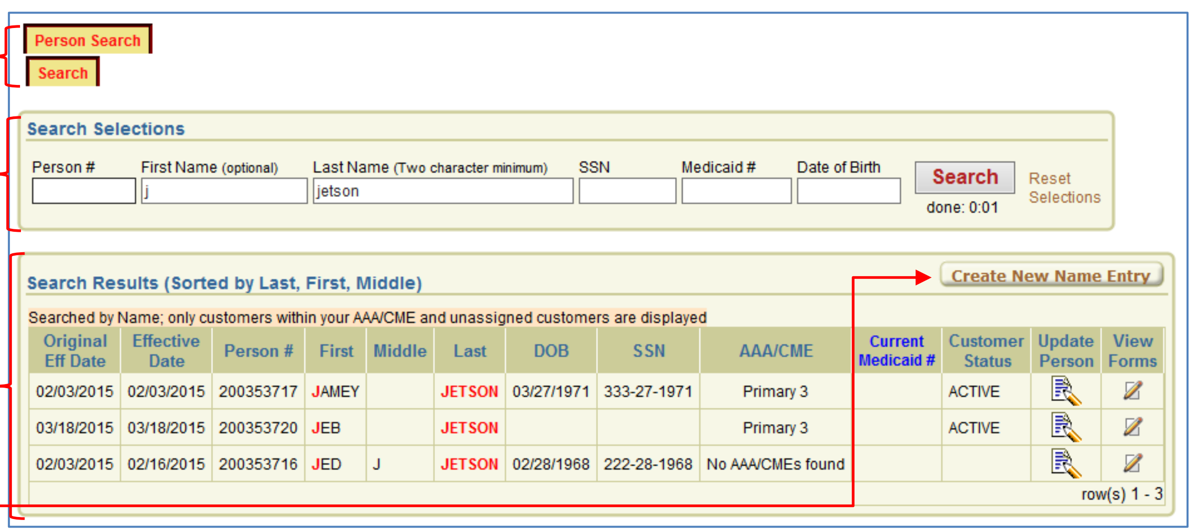
TAKES YOU TO:

Navigation tabs

Search Criteria

Search Results

Create New Person



Original Eff Date	Effective Date	Person #	First	Middle	Last	DOB	SSN	AAA/CME	Current Medicaid #	Customer Status	Update Person	View Forms
02/03/2015	02/03/2015	200353717	JAMEY		JETSON	03/27/1971	333-27-1971	Primary 3		ACTIVE		
03/18/2015	03/18/2015	200353720	JEB		JETSON			Primary 3		ACTIVE		
02/03/2015	02/16/2015	200353716	JED	J	JETSON	02/28/1968	222-28-1968	No AAA/CMEs found				

If the search results do not display the customer you are searching for, you can proceed with creating a new person.

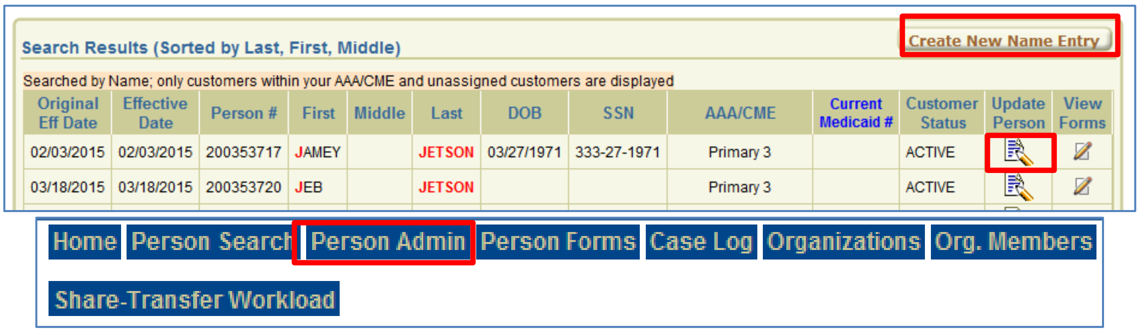
Application Page/Navigation Tabs – Person Admin

Person Admin Page

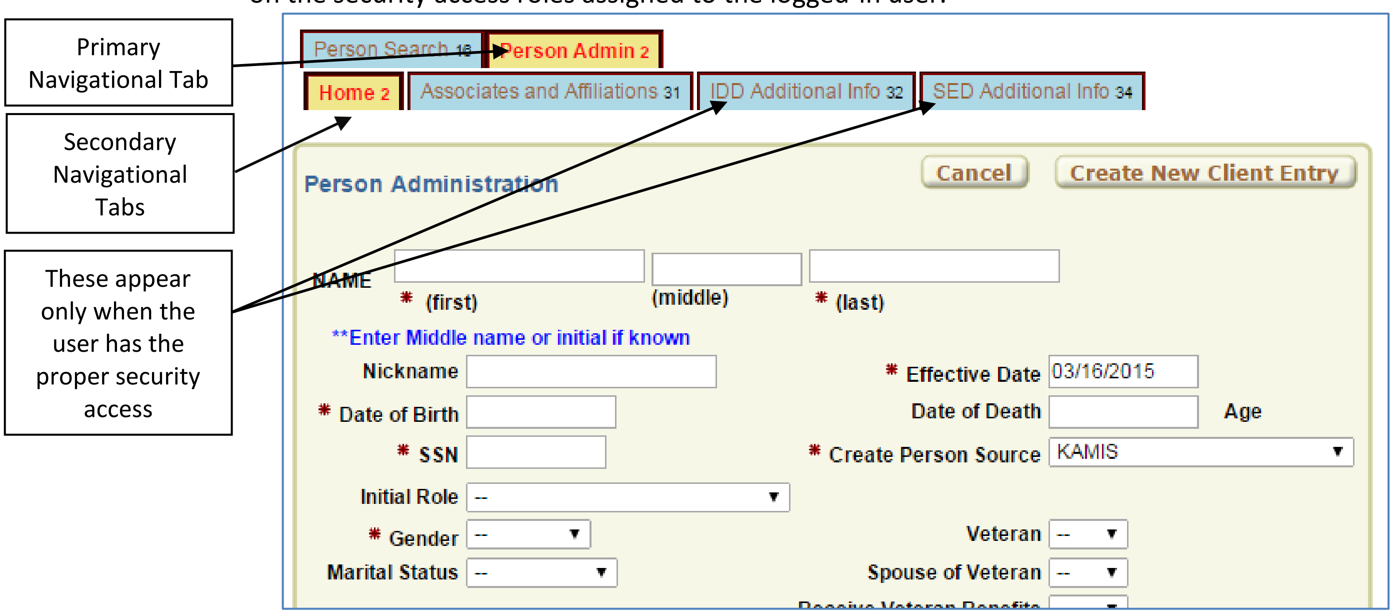
The Person Admin page is where a new person record is created, and where an existing person record can be viewed or updated.

The Person Admin page displays when the user:

- Clicks on the **Create New Name Entry** button on the Person Search page (a blank form displays)
- Clicks on the desired **Update Person** icon in Search Results on the Person Search page (if the user has the proper security access to the Person Admin record)
- Clicks on the **Person Admin** button in the main navigation menu bar at the top of the KAMIS window (the button displays if a person record was previously accessed)



The Person Admin page contains secondary navigational tabs, some of which display depending on the security access roles assigned to the logged-in user.



The yellow tabs indicate which page is currently displayed.

Person Admin Secondary Tabs

The Person Admin primary navigational tab contains the following secondary tabs:

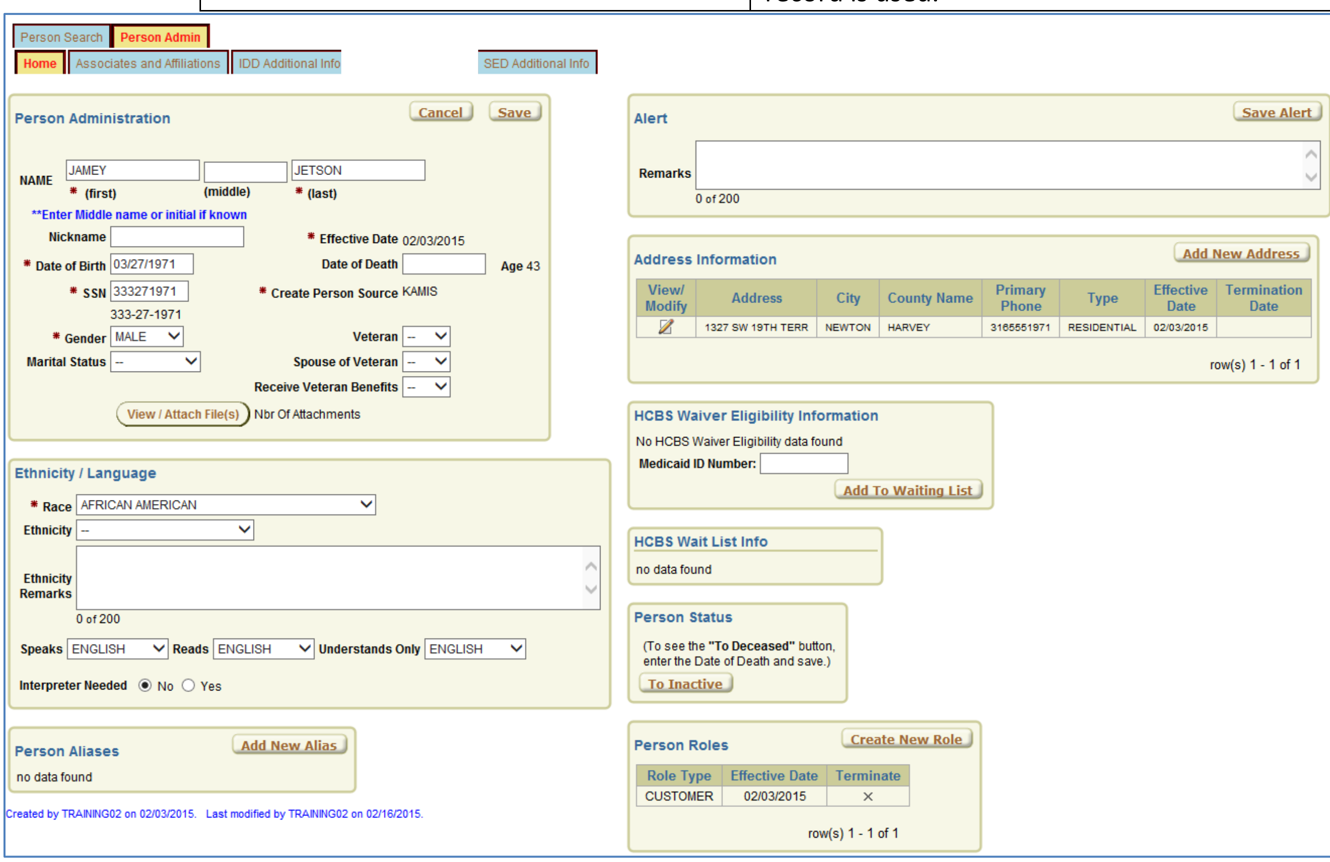
- **Home** – Basic demographic information, HCBS waiver information, Person status, Person roles
- **Associates and Affiliations** – Lists other persons associated with the particular customer record. Also shows Share/Transfers History.
- **[Other] Additional Info** – If the user has the appropriate security access, tabs for other waiver information will display.

Secondary Navigation Tabs – Person Admin/Home

Person Admin/ Home

The Person Admin/Home secondary tab contains the following information:

Region	Contents
Person Administration	Demographic information – including name, DOB, SSN, gender, marital status
Ethnicity/Language	Race, ethnicity, languages
Person Aliases	The person's known aliases. Used mostly for Background Checks, but can be entered for general information.
Alert	Text area for entry of pertinent information about a customer. Alert text appears on the Customer Forms List. *Do not enter PHI that violate HIPAA privacy rules.*
Address Information	Address and phone number history. Multiple address types can be entered: residential, business, mailing, etc.
HCBS Waiver Eligibility Information	Customer Medicaid ID number and eligibility information
HCBS Wait List Info	Displays the waiting list status of customers on waivers that have waiting lists.
Person Status	Status can be Active, Inactive, or Deceased. **Note:** Only persons with the Customer role have a status assigned.
Person Roles	How the person is defined in the system; how the record is used.

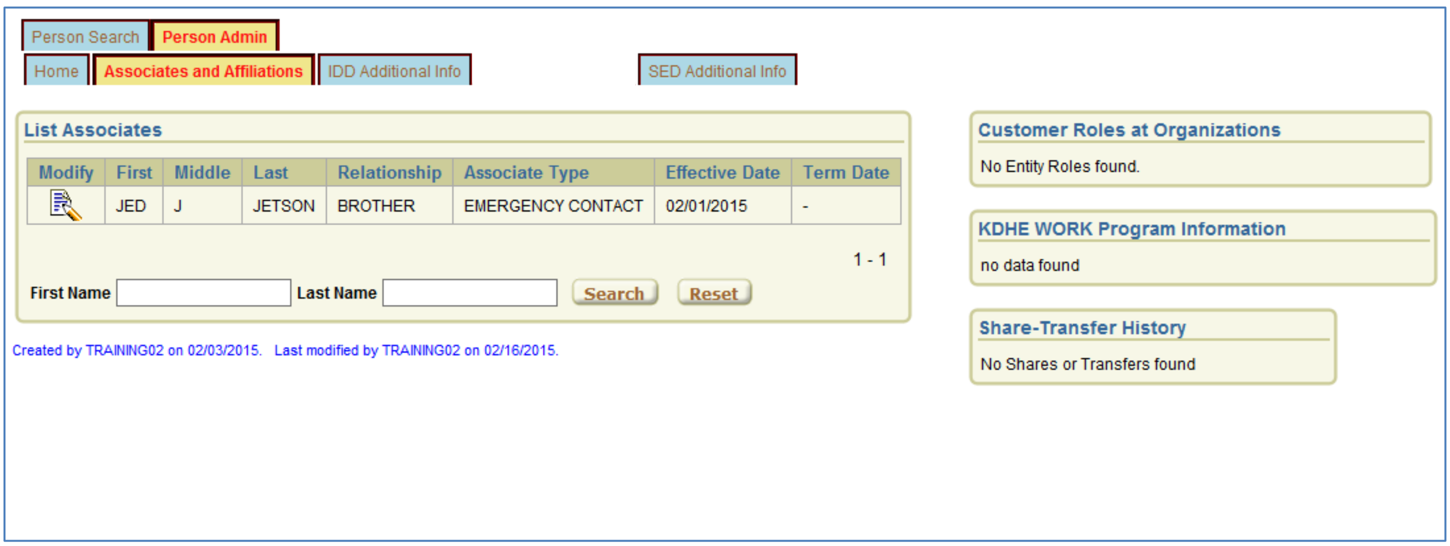


Secondary Navigation Tabs – Person Admin/Associates and Affiliations

Person Admin/ Associates and Affiliations

The Person Admin/Associates and Affiliations secondary tab contains the following information:

Region	Contents
Listing of Associates	Contains information on people associated to this person. **Note**: Associates are usually only found on customer records.
Customer Roles at Organizations	If this person is associated with a particular organization found in KAMIS, the organization will be listed here. **Note**: Organization affiliations are usually only found on person records with case manager, assessor, and other non-customer roles.
KDHE WORK Program Information	This region is not currently being used.
Share-Transfer History	Any Shares or Transfers that have been completed for the customer will appear here. **Note**: Only customer records have Share-Transfer History.



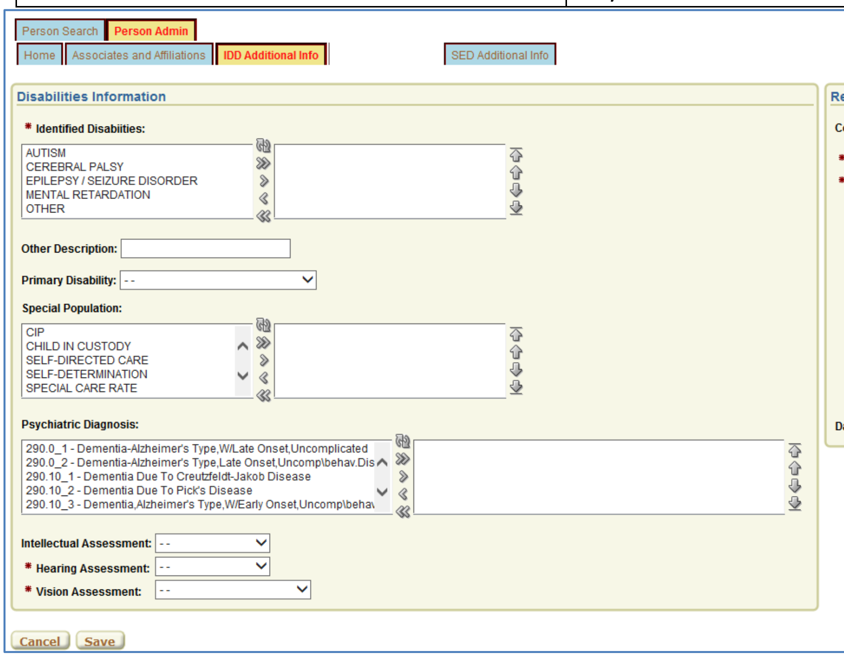
Secondary Navigation Tabs – Person Admin/IDD Additional Info

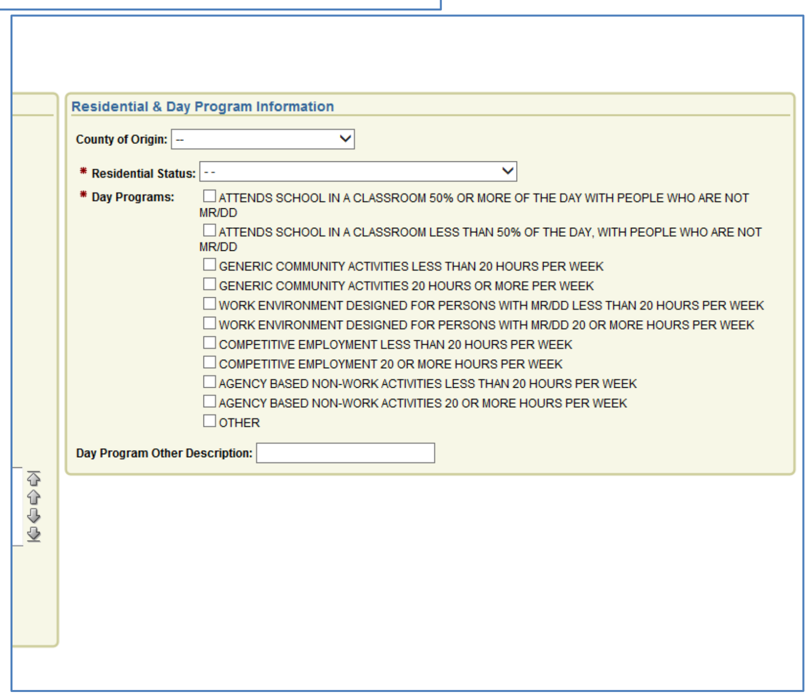
Person Admin/ IDD Additional Info

This tab will display only if the logged in user has the security roles granting access to IDD waiver information.

The Person Admin/IDD Additional Info secondary tab contains the following information for customers on the IDD waiver:

Region	Contents
Disabilities Information	Identifies various aspects of the customer's intellectual and/or developmental disability.
Residential & Day Program Information	Identifies customer's residential status, selected from a pre-defined list, and any day programs he/she attends.





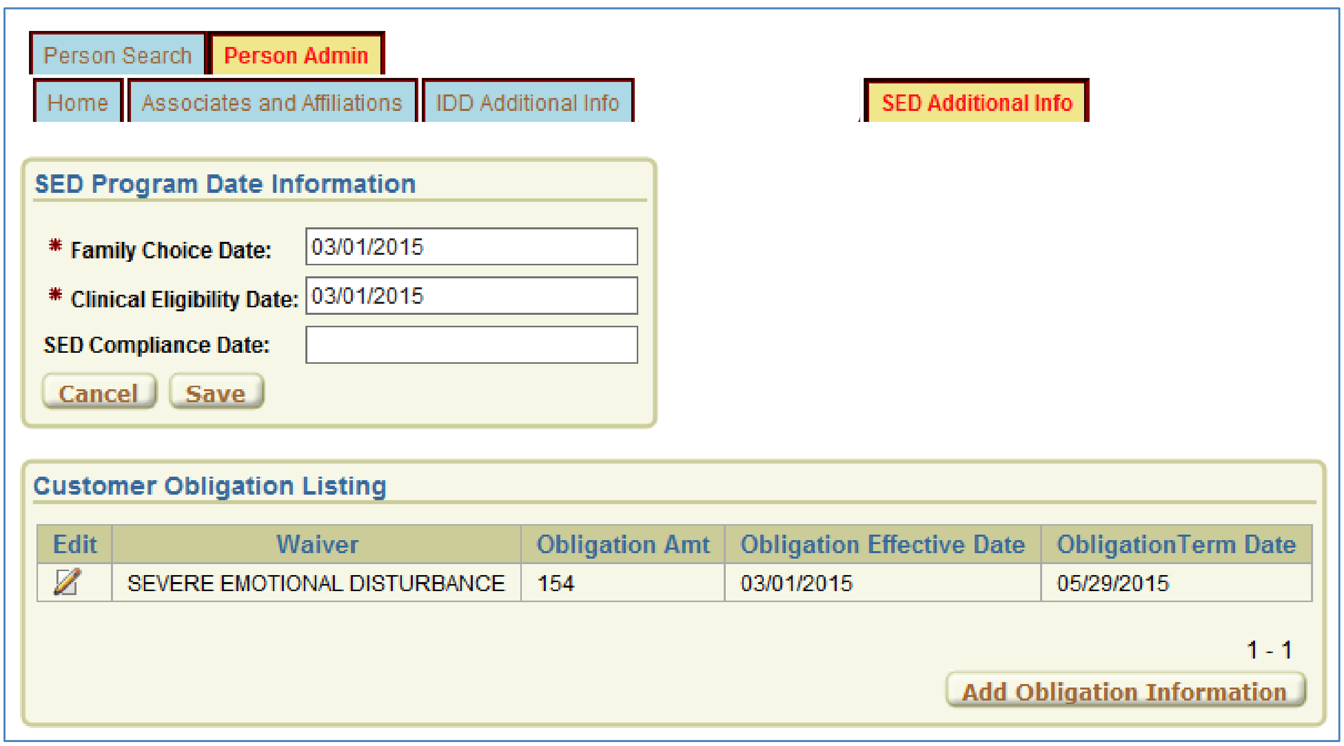
Secondary Navigation Tabs – Person Admin/SED Additional Info

Person Admin/ SED Additional Info

This tab will display only if the logged in user has the security roles granting access to information related to customers on the SED waiver.

The Person Admin/SED Additional Info secondary tab contains the following information for customers on the SED waiver:

Region	Contents
SED Program Date Information	Contains dates having to do with eligibility that are required for completing the Service Authorization. The dates entered here populated the matching fields in the SED Assessment.
Customer Obligation Listing	If the customer has a financial obligation for any services provided, the dollar amount is entered here. This information is used in the Service Authorization.



Creating a New Person - Overview

Introduction

This section is an overview of the steps required for entering a new person into KAMIS using Person Administration.

Person Search

If creating a new person for KAMIS, the first step is to search for the person to determine if they already exist in Person Administration. You can search by one or more parameters:

- Person Number – numeric only
- First Name
- Last Name – Must enter at least 2 characters
- SSN
- Medicaid ID #
- Date of Birth

Person Search Tips

Suggested search parameters:

- Person number (KAMIS ID number)
- Last name and Date of Birth
- Social Security Number
- Medicaid ID #
- First name and last name (this search will only find matches within the logged in user's organization)

If searching by all available parameters and the person is not found, re-do the search with fewer parameters. It is not uncommon for a person to be in the system without a social security number or Medicaid number, as those are not required fields in KAMIS.

Note: See the Person Search chapter in the KAMIS User Manual for detailed information on Person Search rules. Reminder: The Person Search function only searches for customer records. Associate searches are covered later in this chapter.

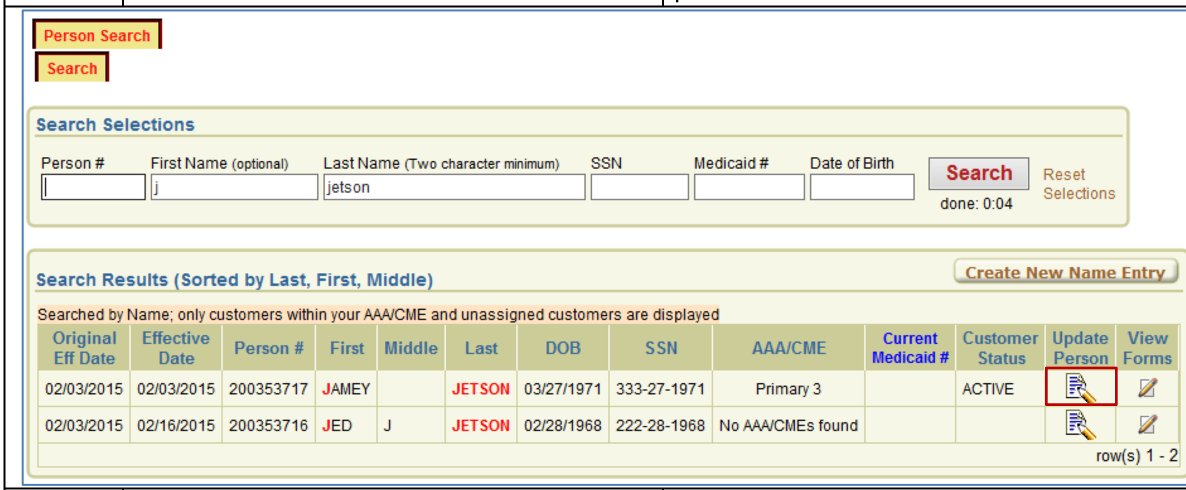
Create New Person

If the person search does not find the customer ('No Data found' result), proceed with creating a new person using the 'Create New Name Entry' button.

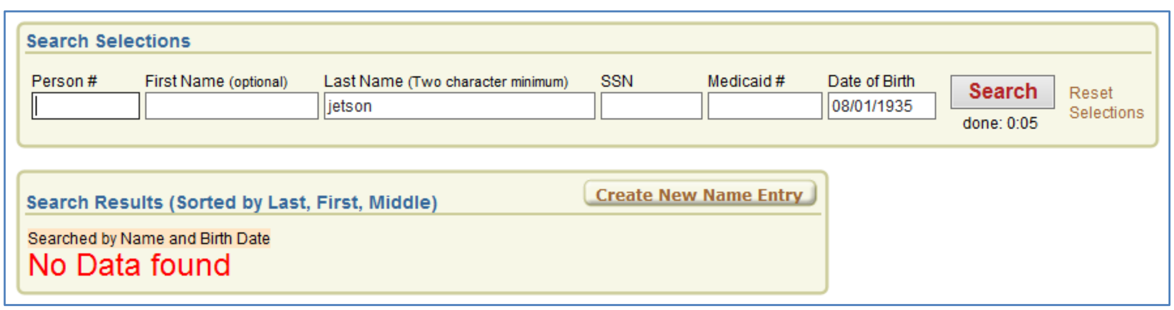
Completing a Search Prior to Creating Person

How To Follow the steps in the table below to search for a customer in KAMIS:

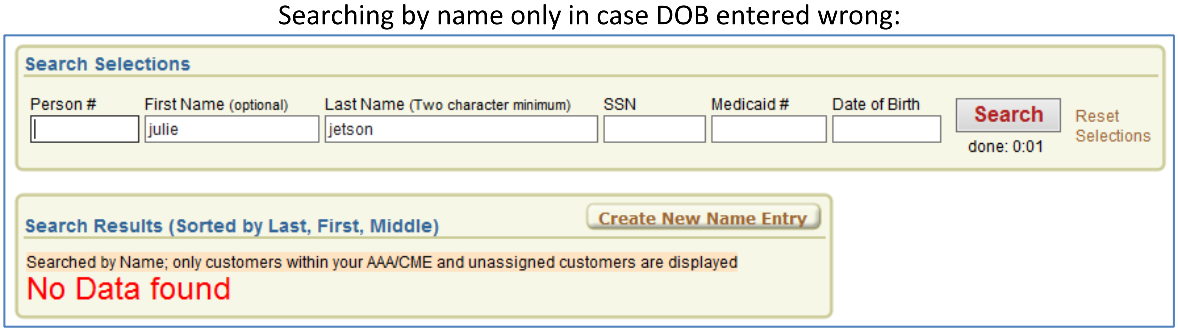
Step	Action	Result
1.	On the KAMIS Home Page, or the Person Search page, enter the desired Search Criteria	Search fields are populated.
2.	Click on the Search button	When complete, a list of the matches found or a 'no data found' message will display.
3.	If the desired customer is in the Search Results, click on the Update Person icon.	The customer's Person Administration page displays. You do not need to create a new person.



4.	If the customer is not in the Search Results, or you get a 'no data found' message…	you will create a new customer record as described in the next section.



Searching by name only in case DOB entered wrong:



Create a New Person

Introduction

This section explains how to create a new person in Person Administration. It will cover:

- Creating the Person Record
- Duplicate Records

Create New Name Entry

If Person Search does not show any entries that match your search criteria, you can proceed with creating a new person record using the **Create New Name Entry** button on the Search Results page.

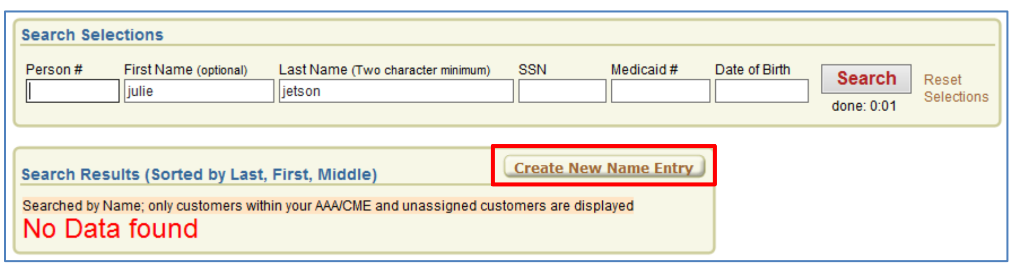
Important Note: These instructions are written based on a customer being created. If the person is not a customer, they can be created using this process, but be aware that the Person Search function will only find person records created with a Customer role, so accessing a non-customer's person record must be accomplished through other functions.

The red asterisks (*) denote a field that is required for some applications, but not necessarily all apps that use Person Administration. However, if the person is a customer, it is recommended that you enter as complete information as possible. Even though some of these fields are not initially required in KAMIS, some forms cannot be saved and/or approved without them.

How to

Follow the steps in the table below to create a new person.

Step	Action	Result
1.	Click on the **Create New Name Entry** button in the Search Results region.	



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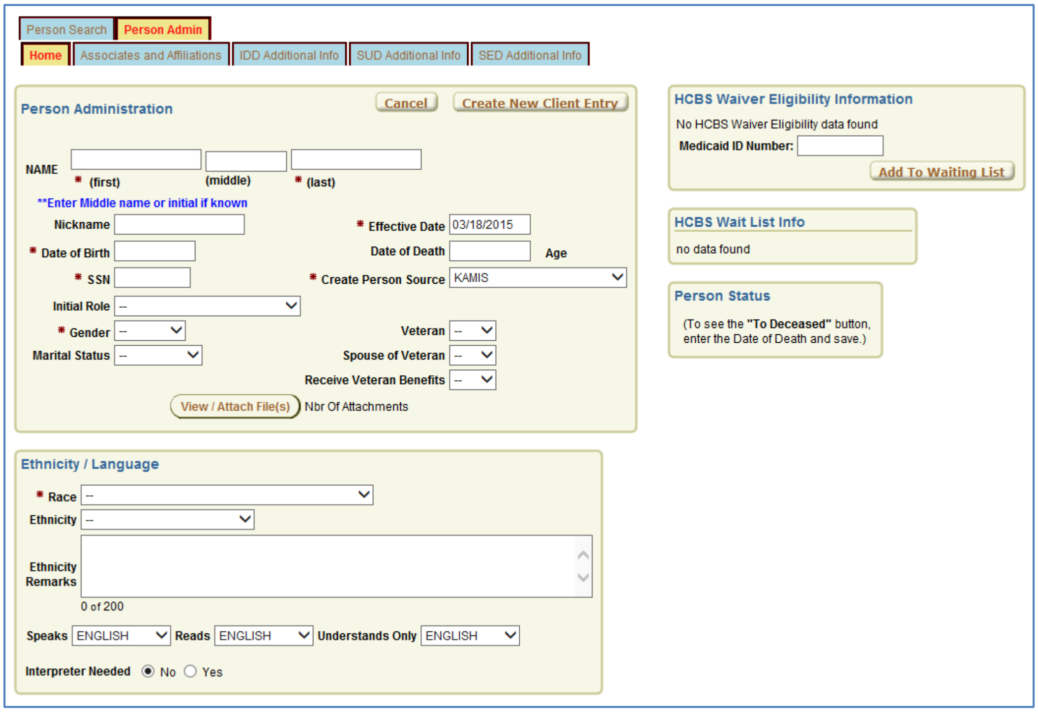
Create a New Person, continued

How to *continued*

Step	Person Administration Region action	Result
		The **Person Admin/Home** page displays.
		
2.	Enter the person's legal **First** and **Last** name. If known, enter the Middle name or initial (not required). The Nickname field can be used to enter the person's nickname or their 'goes by' name.	In general, do not use punctuation when entering information in Person Admin fields. **Exception:** If a person's legal first name is initials only, it is permissible to can enter the first name as initials only – for example, A.J. If not, use the nickname field to enter A.J. and enter the legal first name in the First Name field.
3.	Enter the person's **Effective Date**.	Defaults to the current date, but if there is an assessment that needs to be entered with an assessment date that is before the current date, change the Effective Date to the assessment date.
4.	Enter the person's **Date of Birth**.	The slashes will be inserted automatically.
5.	If known, enter the person's **Social Security Number**.	Enter numbers only; do not enter the dashes.
6.	Select **KAMIS** as the **Create Person Source**.	It should be the default choice
7.	Select the **Initial Role** for this person.	If this person is a customer but will have additional roles, choose Customer as the initial role so you can search for the record again later using Person Search.

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Create a New Person, continued

How to *continued*

Step	Person Administration Region action	Result
8.	Select the **Gender** from the drop-down list.	
9.	If known, select the **Marital Status** of the person.	
10.	If known, complete the **Veteran** information.	
	Ethnicity/Language **Region action**	**Result**
11.	Select the **Race** of the person.	
12.	Select the **Ethnicity** of the person.	
13.	Make any other changes as necessary to the Ethnicity/Language region as desired.	Not required
	Other Regions action	**Result**
14.	If this is a Medicaid customer, enter their **Medicaid ID Number** in the 'HCBS Waiver Eligibility Information' region.	Enter only the number - no spaces or dashes.
15.	To save the new person record, click on the **Create New Client Entry** button at the top of the Person Administration region.	The person record is successfully saved, a unique Person Number is assigned, and the screen displays additional regions (see screen image below.) **OR** A Duplicate Entry is found and requires further action before the record can be saved successfully. See the next section for instructions to complete the new client entry if possible duplicate entries are found.

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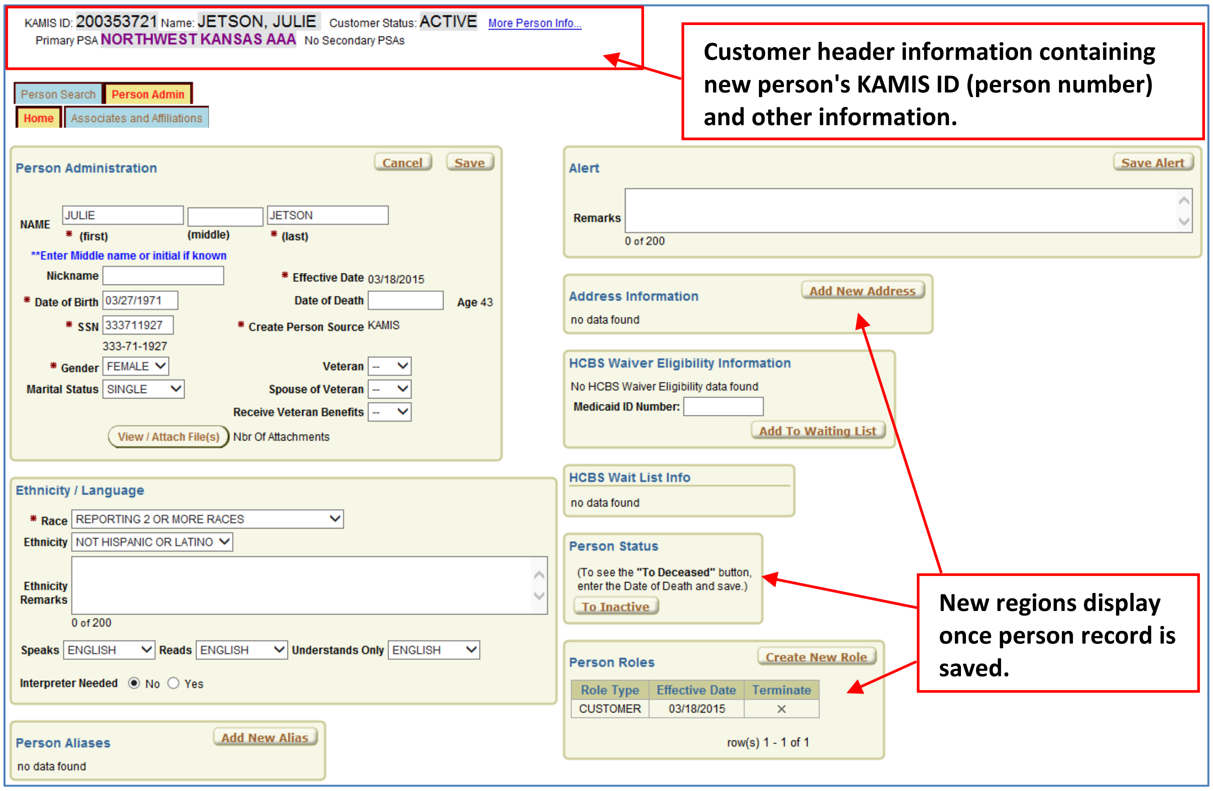
Create a New Person, continued

Completed Person Admin page



New Regions

- **Address Information** – add residential, business, mailing addresses here.
- **Person Status** – A newly created person with a Customer role will automatically be in 'Active' status. The Person Status region is used to change the status to Inactive or Deceased. Only customers have a Person Status.
- **Person Roles** – All roles assigned to a person record display here.

These regions will be covered later in this chapter.

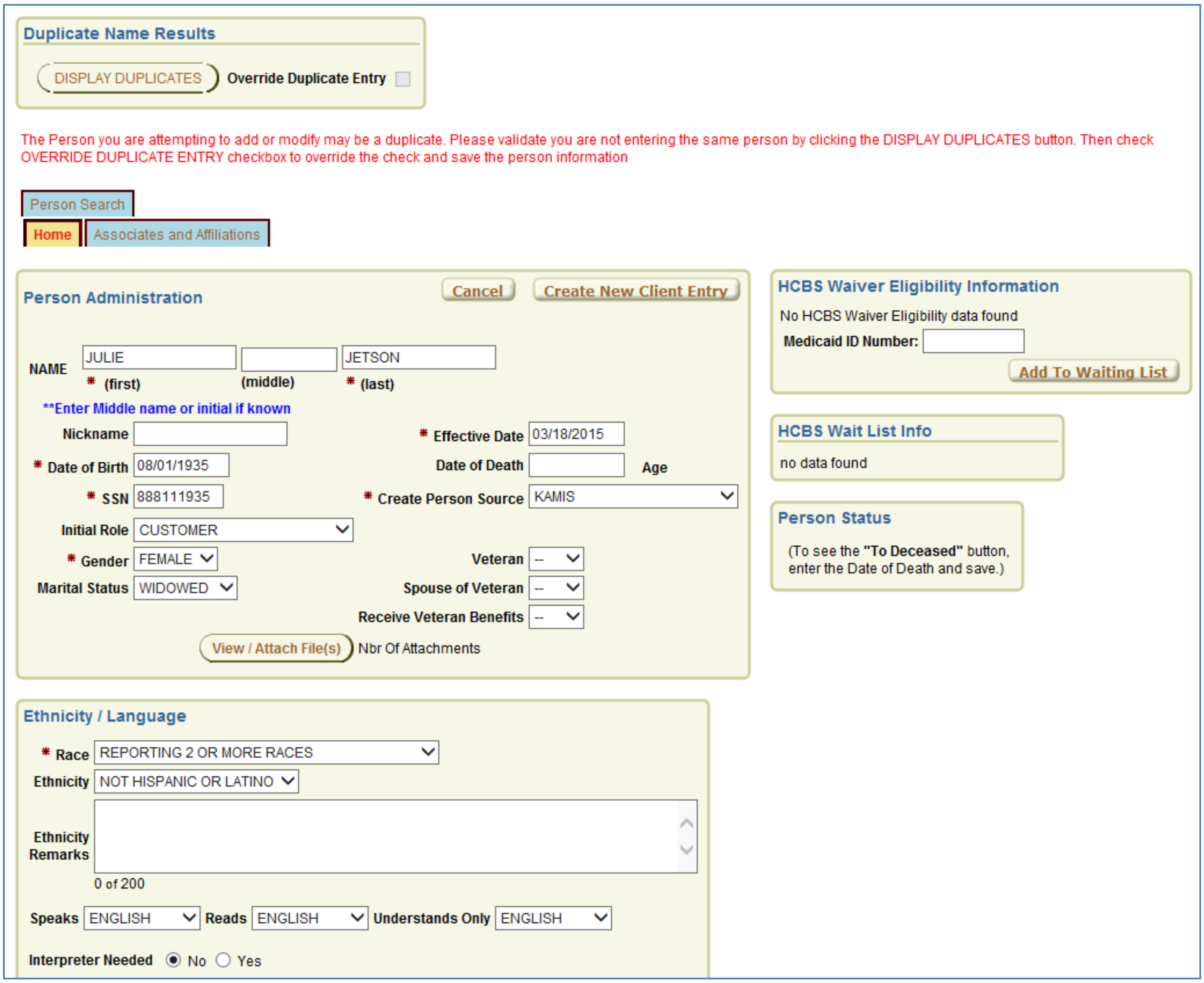
Possible Duplicate Record Found

Introduction

No person should be entered more than once into Person Administration. To help reduce the number of duplicate entries, a comparison is done when a new person record is created, or when the Social Security Number or Date of Birth is changed or added to an existing person record.

If the comparison finds an existing person record that already has the new person's last name, social security number, or date of birth, the Duplicate Name Results region appears.

When a potential duplicate person record is found, you must determine if it is the same person as the one you are attempting to create.



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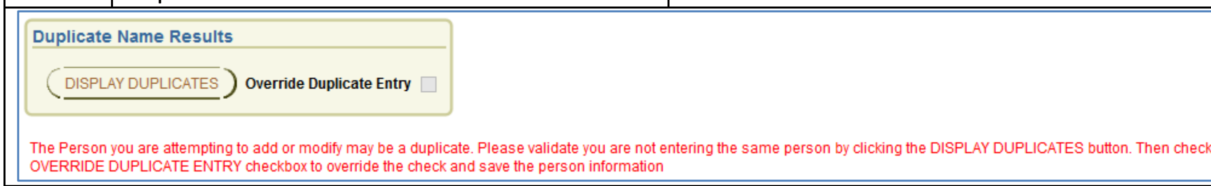
Possible Duplicate Record Found, continued

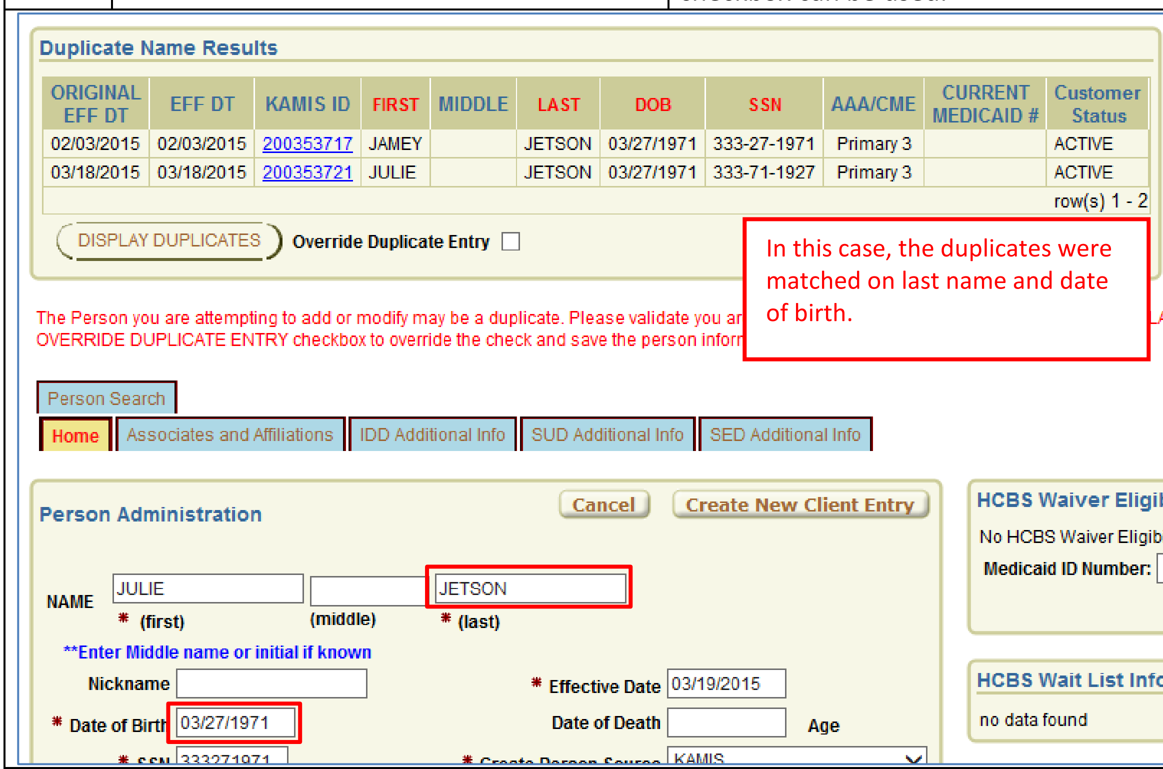
How To

Follow the steps in the table below to review a possible duplicate record.

Step	Action	Results
1.	**Previous section's last step was** to save the new person record**.** When the **Create New Client Entry** button was clicked, a check was done for possible duplicate person records within Person Administration.	A duplicate entry is found and requires further action: The **Display Duplicate** button displays, with a disabled 'Override Duplicate Entry' checkbox next to it. The duplicate check compares the following: • First Name and Last Name • Social Security Number • Last name and DOB
2.	Read the Duplicate Name Results message that appears in red below the 'Display Duplicates' button.	The message provides directions for how to deal with the duplicate name results.



Step	Action	Results
3.	Click on the **Display Duplicates** button.	The potential duplicate person records display. You must display the duplicates before the 'Override Duplicate Entry' checkbox can be used.



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How To *continued*

Step	Action	Results
4.	Compare the information to determine if the new entry and any of the potential duplicates is the same person.	Follow the steps below:

Determination	Action
a. A potential duplicate is the **same** person you are attempting to create.	Click on the KAMIS ID link of the existing record that is the same person. Their Person Administration page opens, and you can review and make any changes as necessary. The original record you started to create will be canceled automatically.
b. **None** of the potential duplicates is the same person as the one you are attempting to create.	• Click on the **Override Duplicate Entry** check box. The box displays with a checkmark. • Click on the **Create New Client Entry** button to finish creating the new person record you started with.
c. **Not sure** – need more information to make determination.	Click on the KAMIS ID link for the existing record that is potentially the same person. Their Person Administration page opens, and you can review this information (Address, etc.) to determine if this is indeed the same person. • If it is, update this record as needed and save any changes. • If it is not, click on the Cancel button. The Person Search screen displays. Click on the **Create New Name Entry** button and re-enter the new person information.

Step	Action	Results
5.	1a, 1b, or 1c above is completed.	The person record is now created or updated, and additional regions are available for entry.

Adding Person Roles

Introduction

Every person added to Person Administration has at least one role. This 'initial role' is required when creating a new person. It is possible for a person to have more than one role, depending on how their person record is used in KAMIS.

Person Roles

After a person record has been created, and an Initial Role assigned, it is possible to add additional roles to the person. Additional roles may be assigned depending on why the person is in the system. The ability to add multiple roles to a single person record re-emphasizes the rule that no person should be created more than once in the Person Administration application. Following are three examples of persons with multiple roles:

Example 1: John Doe is receiving services via the HCBS/FE waiver. Mr. Doe is also the husband of Jane Doe, who is also receiving services. Both John and Jane will have two roles – *Customer* (receiving services) and *Associate* (has a business or personal relationship with another person in the system).

Example 2: Mary Smith is the daughter of a customer entered in the system. Mary Smith is also a case manager for an unrelated customer receiving services via the HCBS/IDD waiver. Mary will have two roles – *Associate* (has a business or personal relationship with another person in the system) and *Case Manager* (case manager for another person in the system).

Example 3: Paul Person is a customer, receiving services via a variety of funding sources. His sister is also in the system, and he is listed on her account as her brother. Paul has applied for employment with one of the State Hospitals/Institutions. Paul will have three roles – *Customer* (receiving services), *Associate* (has a business or personal relationship with another person in the system), and *Employee* (so the State Hospital/Institution can do an employee background check.)

The most common roles used in KAMIS are *Customer*, *Associate*, *Case Manager*, and *Assessor*. The table below contains all the roles that can be assigned to a person record:

Available Roles	
Administrator	Employee
Applicant Employee	Employee Caregiver
Applicant Volunteer	Foster Grandparent
Assessor	Foster Parent
Associate	Intern
Care Recipient	Nurse
Caregiver	Options Counselor
Caregiver Grandparent	Social Worker
Case Manager	Student Nurse
Customer	Volunteer
Doctor	

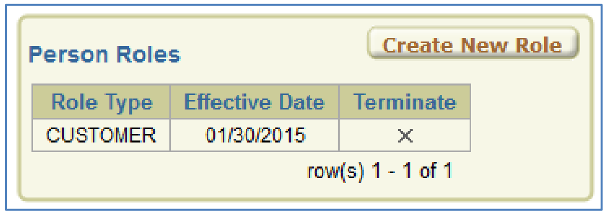
Continued on next page

Adding Person Roles, continued

How to

Follow the steps in the table below to add an additional role to an existing person record.

Step	Action	Results
1.	From the Person Administration/ Home tab, locate the **Person Roles** region.	Any existing roles already assigned to the person record displays here.



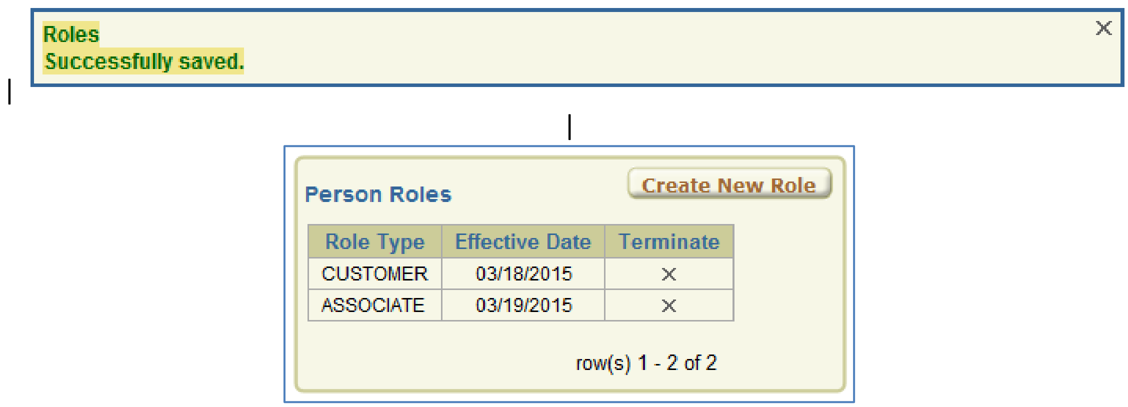
Step	Action	Results
2.	Click on the **Create New Role** button.	The **Role Administration** page will display.
3.	Select the **Role** to be added. Only one role can be selected at a time.	The radio button next to the role type is selected.

Continued on next page

Adding Person Roles, continued

How to (continued)

Step	Action	Results
4.	Click on the **Create New Role** button at the bottom of the Role Administration region.	The page will return to the Person Administration/Home tab, with a 'Roles Successfully saved' message at the top of the page. The Person Roles table now displays the initial and added role.

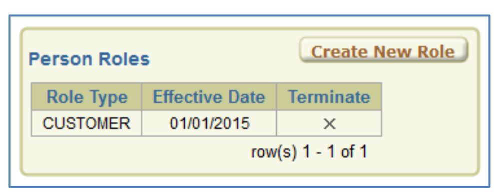


Step	Action	Results
5.	Repeat the above step to add any more roles.	

Terminate a Role If a role is added erroneously, or is no longer needed, you can terminate a Person Role.

How to Follow the steps in the table below to terminate a Person Role.

Step	Action	Result
1.	In the **Person Roles** region, click on the “X” under the Terminate column next to the role to be terminated.	The Role Administration window for the person displays.
2.	Enter a Termination Date for the role to make the role inactive.	Type the date or use the date-picker to insert a date.
3.	Click on the **Terminate Role for Client** button	The role is removed from the Person Roles region on the Person Administration/Home page.



Changing a Customer's Status

Introduction

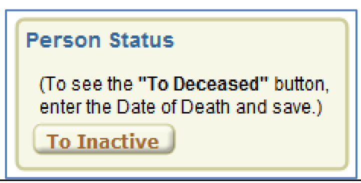
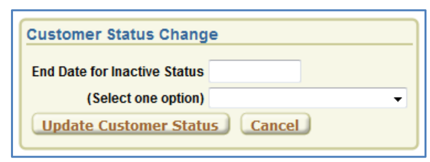
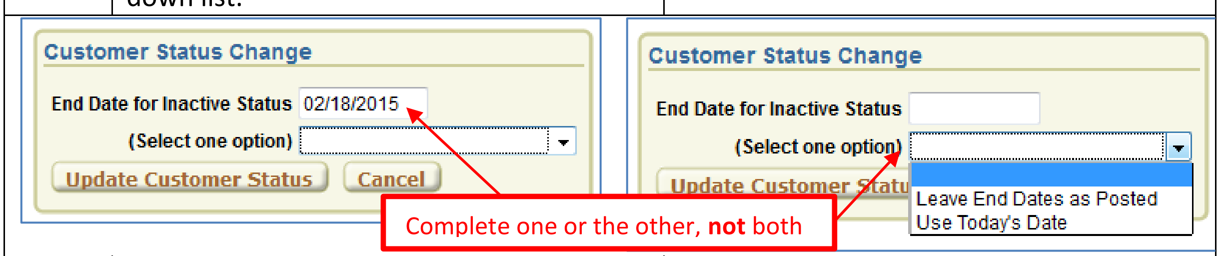
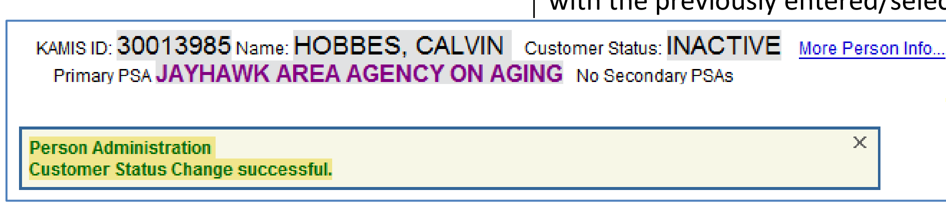
A customer's status within Person Administration is either Active, Inactive, or Deceased. The Active role is assigned automatically when a new customer is created, or when the Customer role is added to an existing person.

Role	Definition
Active	The customer is newly created or is an existing customer with a current assessment or other KAMIS form.
Inactive	The customer does not have a current assessment or intake with the Primary or Secondary organization, and is not receiving services.
Deceased	The customer has died.

Note 1: Only person records with the Customer role have a Person Status assigned.
Note 2: A customer must be in Active status for a new form to be created, or to update an existing one.

Inactivate a Customer

Follow the steps in the table below to change a customer's Person Status to Inactive.

Step	Action	Result
1.	In the Person Status region, click on the **To Inactive** button.  	The **Customer Status Change** page displays. 
2.	Either enter the end date for inactive status *OR* select one of the options from the drop-down list.	If you enter both a date and select one of the options, you will get an error.
	 	
3.	Click on the **Update Customer Status** button.	The Person Admin/Home page displays with a message confirming the status change, and the Customer Status in the customer information header changes to INACTIVE. Any open service lines are closed with the previously entered/selected date.
	 	

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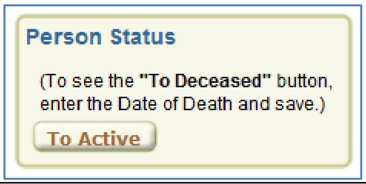
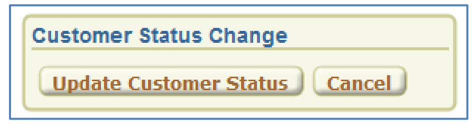
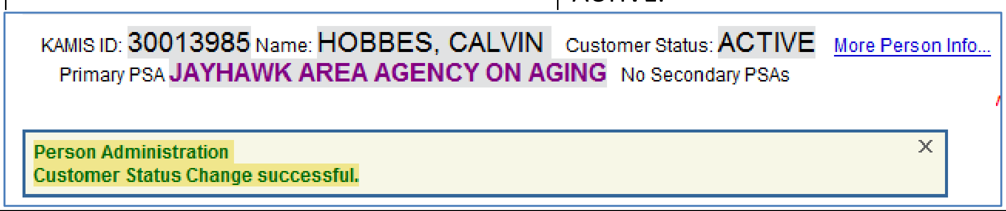
Changing a Person’s Status, continued

Activate a Customer

If a customer's Person Status is *Inactive*, you cannot create new forms for that customer until you change the status back to *Active*.

Follow the steps in the table below to change a customer's Person Status back to *Active*.

Step	Action	Result
1.	In the Person Status region, click on the **To Active** button. 	The **Customer Status Change** page displays. 
2.	Click on the **Update Customer Status** button. 	The Person Admin/Home page displays with a message confirming the status change, and the Customer Status in the customer information header is changed to ACTIVE.

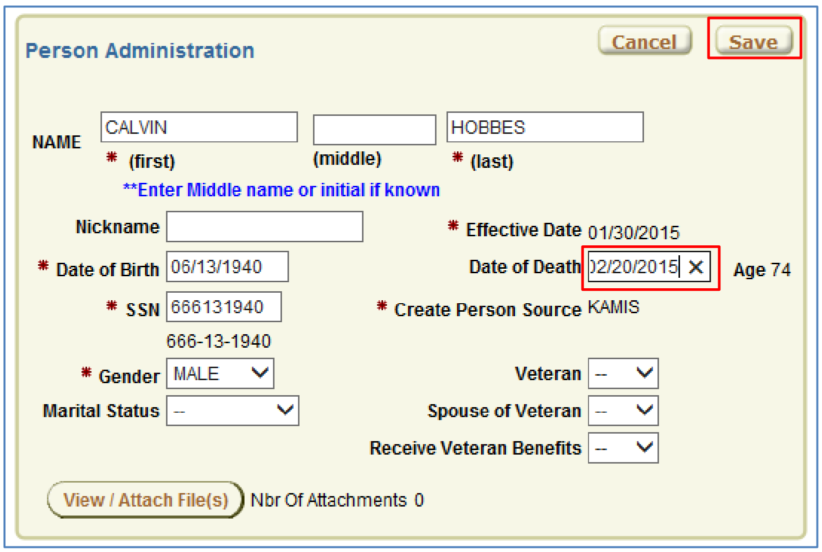
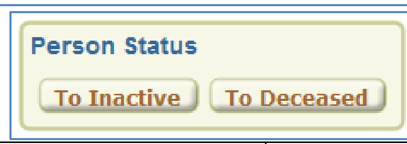
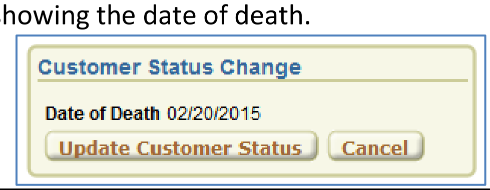
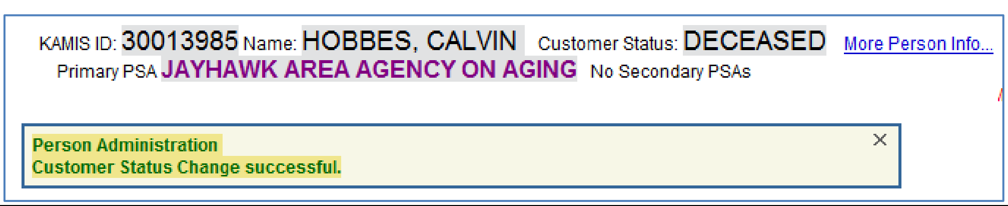
Continued on next page

Changing a Person's Status, continued

Decease a Customer

When a customer dies, you should change the Person Status to *Deceased*. Any open service lines on the customer's plan of care are closed automatically.

Follow the steps in the table below to change the Person Status to *Deceased*.

Step	Action	Result
1.	In the Person Administration region of the Person Admin/Home page, enter the **Date of Death** for the customer and click on the Save button.	The date of death is saved and the Person Status region is updated to include the 'To Deceased' button.
	 	
2.	In the Person Status region, click on the **To Deceased** button.	The Customer Status Change page displays, showing the date of death. 
3.	Click on the **Update Customer Status** button.	The Person Admin/Home page displays with a message confirming the status change, and the Customer Status in the customer information header is changed to DECEASED.
		

Alert

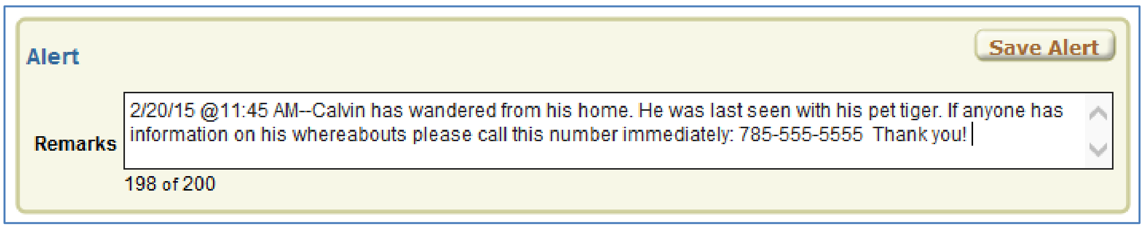
Introduction

The Alert is a tool used to convey an immediate informational notice regarding a person. Anyone that can view the person's Person Administration page or the Forms List can see the Alert. Any user that has access to edit the person's Person Administration page can delete or change the message, and no history is kept of previous Alerts. It is recommended that the customer Case Log be used for any permanent informational notes.

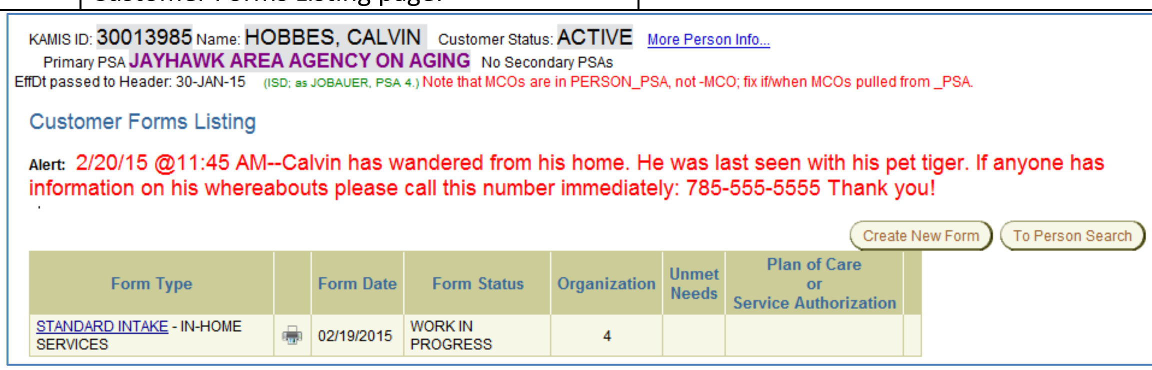
How To

Follow the steps in the table below to add an Alert message.

Step	Action	Results
1.	In the **Alert** Region, type the desired information that pertains to the person.	You can type up to 200 characters in the alert text area.



Step	Action	Results
2.	Click on the **Save Alert** button.	The Alert is saved.
3.	Click on the Person Forms button in the navigation menu bar to view the Alert on the Customer Forms Listing page.	The Alert displays at the top of the Forms List in large red type:



Add Address Information

Introduction

Most forms in KAMIS require a customer to have a residential address in order to save the form in Approved status. Some forms require certain types of associates to have a business or residential address in order for the name to appear in some drop-down lists, or for a form to be saved in Approved status.

Address Types

A person may have several different types of addresses.

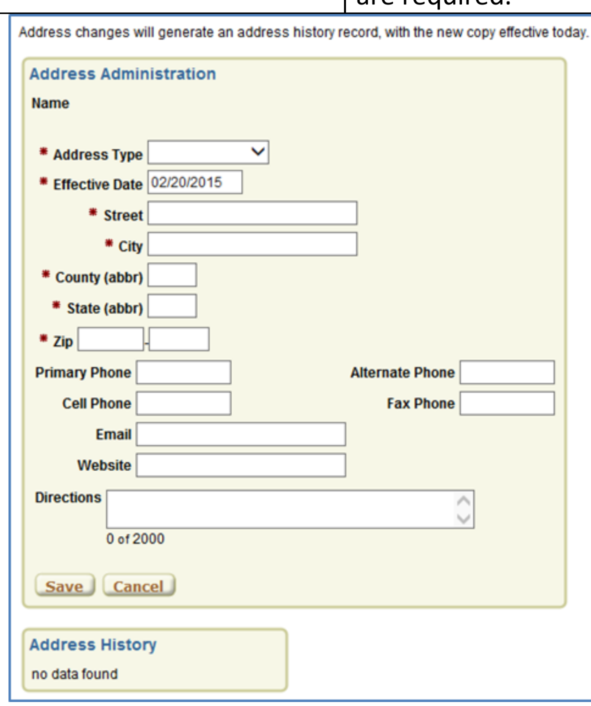
Available Address Types	
Alternative	Mailing
Billing	Residential ***Required for All Customers***
Business	Shipping

Two additional address types may appear in the Address Information region within Person Administration – 'Conversion Address' and 'MMIS/KMAP Address.' These address types are read-only and are only added or updated by automated processes in KAMIS.

How To

Follow the steps in the table below to add an address to a person record.

Step	Action	Results
1.	If this is the first address added for this customer, the **Address Information** region will display a 'no data found' message.	
2.	Click on the **Add New Address** button.	The Address data entry page displays. Note: All fields marked with an asterisk (*) are required.

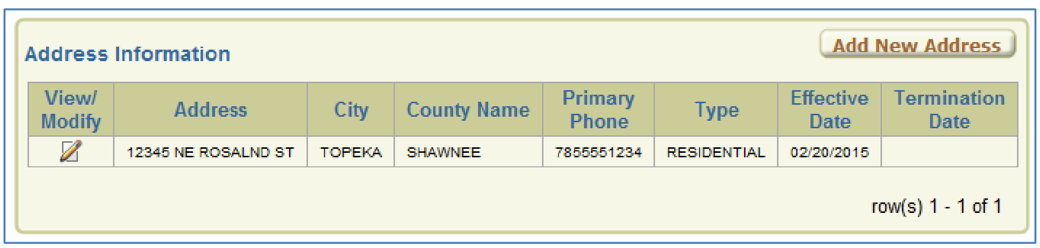


Continued on next page

Add Address Information, continued

How To *Continued*

Step	Action	Results
3.	Select the desired **Address Type** from the drop-down list.	A Residential address is required for all assessment forms.
4.	Enter **Address Effective Date**.	Defaults to the current date.
5.	Enter a complete address. You must enter something in the Street, City, County, State and Zip code fields.	Enter as complete information as possible, including a phone number if you have it.
	• If you do not have an address for the person, (as may be the case with an emergency contact that you only have a phone number for) you can enter 'Unknown' for the Street and City if you do not know either. If you do not know the County, State, or Zip Code, you can use the information from the customer associated with this person. • If the person is homeless, you can enter 'Homeless' as the Street address. The City, State, County, and Zip code can be entered as you see fit, but something must be entered. For example, you can use your agency's city, county, etc. • If the address is out of state, enter ZZ for the county. If the address is outside of the United States, use ZZ for the State.	
6.	Click on the **Save** button.	Person Admin/Home page displays with the new address displayed in the Address Information table.


Address Information

Add New Address

View/ Modify	Address	City	County Name	Primary Phone	Type	Effective Date	Termination Date
	12345 NE ROSALND ST	TOPEKA	SHAWNEE	7855551234	RESIDENTIAL	02/20/2015	

row(s) 1 - 1 of 1

Update Address Information

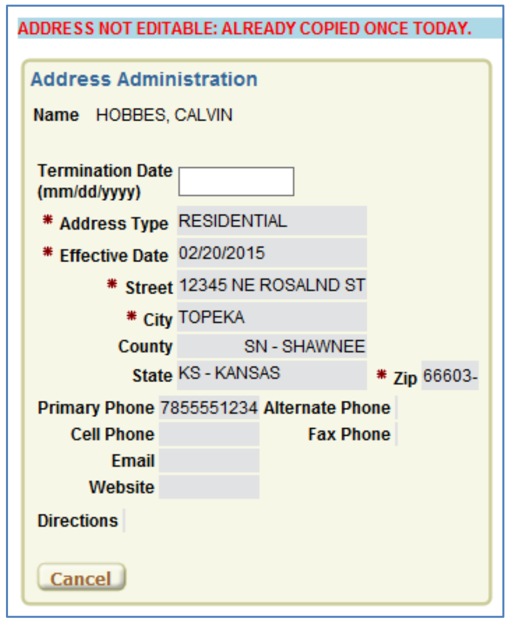
Introduction

If a person's address information changes, it will be necessary to update the information in Person Administration. It may just be fixing an error in an existing address, or changing it completely. The original address is terminated, and the updated/new address is created as a new address record. As long as the person's Effective Date does not change, the address history will be available.

If something is changed in the demographic information that causes the person's Effective Date to be updated, only the current addresses will roll over with the new Effective Date, and any future changes that occur with the new Effective Date will be available.

Important

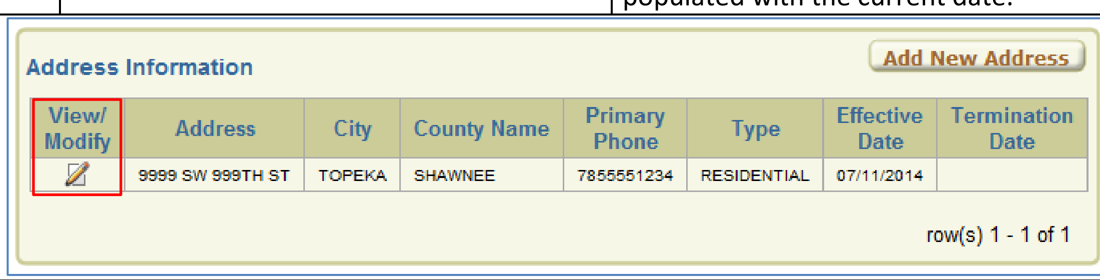
Due to the history collection features of Person Administration that are used in some state and federal reporting, an address can only be updated once within a 24-hour period. If you try to edit an existing address record within that 24-hour period, you will see a notice at the top of the Address Administration (update) page and the address information displays as read only:



How To

Follow the steps in the table below to update an existing address.

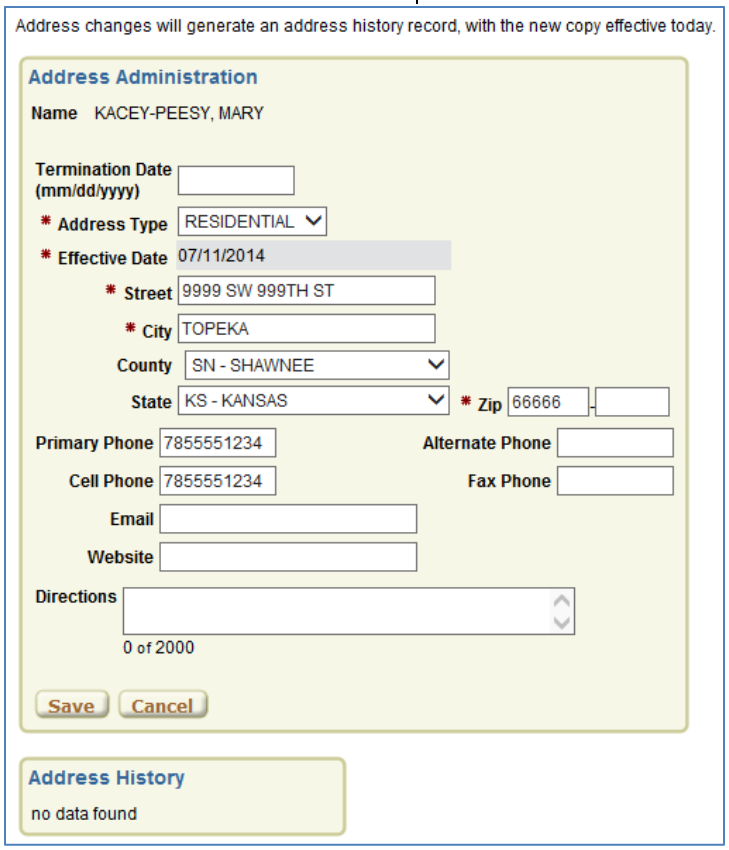
Step	Action	Result
1.	In the Address Information region, click on the **View/Modify** icon next to the address to be updated.	The Address Administration page displays with all fields available except the Effective Date. The Effective Date is automatically populated with the current date.



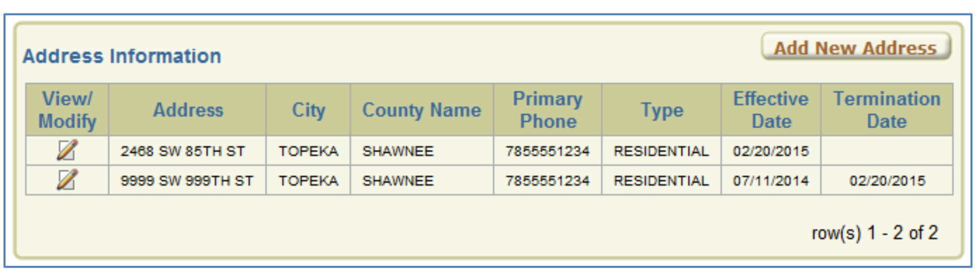
Continued on next page

How to *continued*

Step	Action	Result
1.	*continued*	



Step	Action	Result
2.	Update the address as needed.	
3.	Click on the **Save** button.	The old address is terminated automatically, and a new address record is created with the updated information. The Person Admin/Home page displays and the Address Information region reflects the changes made.
4.	Review the Address Information region.	The Address Information table shows the old address with the current date as the Termination Date. The new address displays with the current date as the Effective Date, with no termination date, indicating it is the current address.



Person Aliases

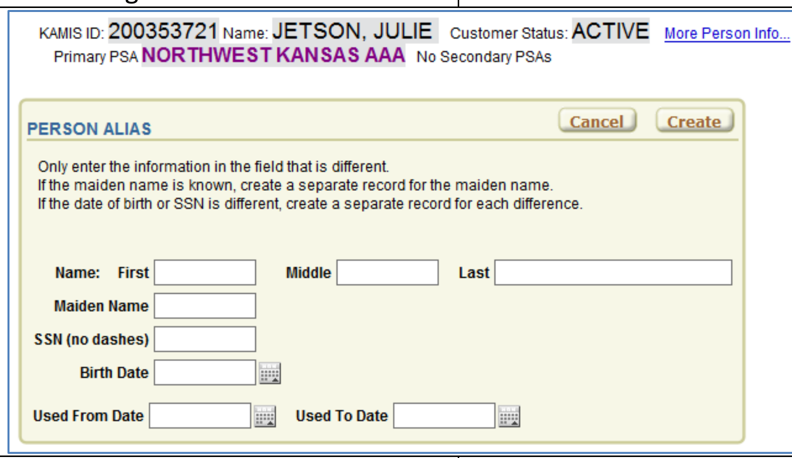
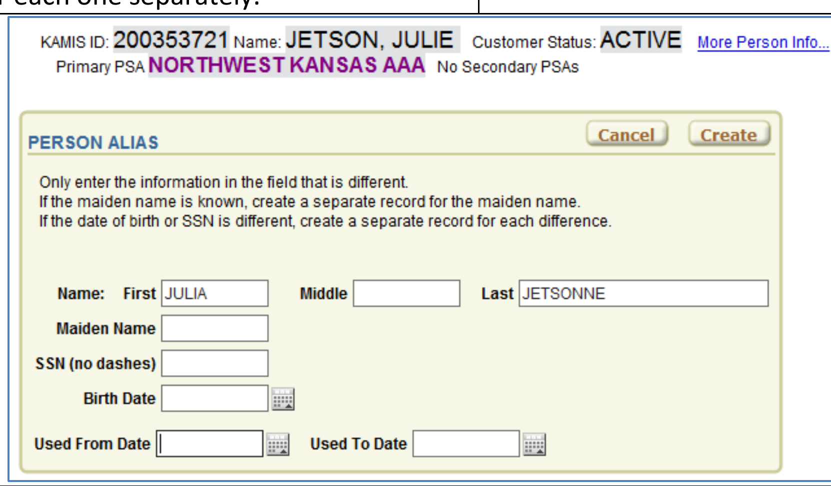
Introduction

The Person Aliases region was added to Person Administration for use by other KDADS web applications that require this level of person record detail. It can be used in KAMIS, although KAMIS does not use the information anywhere else, and does not access the information for any searches it does. The information would be available for reference purposes only.

An alias entry consists of a single timeframe for which the alias was used (if known) and the specific alias for that timeframe. If the person is known by several names (maiden name, married name, second married name, etc.) separate entries must be entered for each name.

How To

Follow the steps in the table below to enter a person alias.

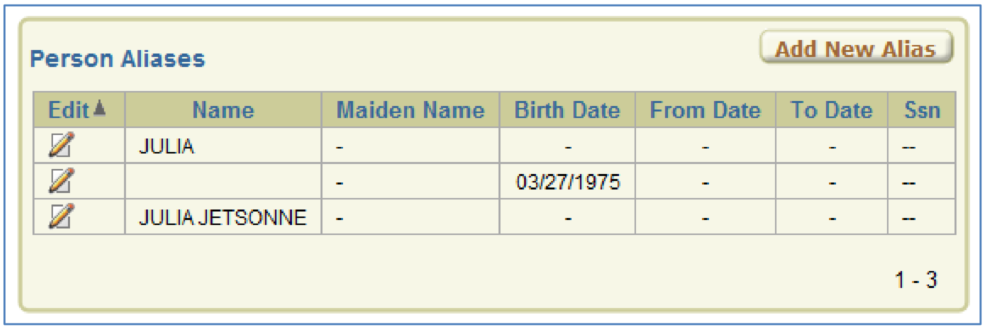
Step	Action	Result
1.	Click on the **Add New Alias** button in the Person Aliases region.	The **Person Alias** entry page displays.
		
2.	Enter only the alias information known for the specific timeframe you are entering. If the timeframe is unknown, and you do not know if any of the aliases overlap, enter each one separately.	Examples: If only the first name is different, just enter the first name. If only the Birth Date is different, with no name change, enter just the Birth Date.
		

Continued on next page

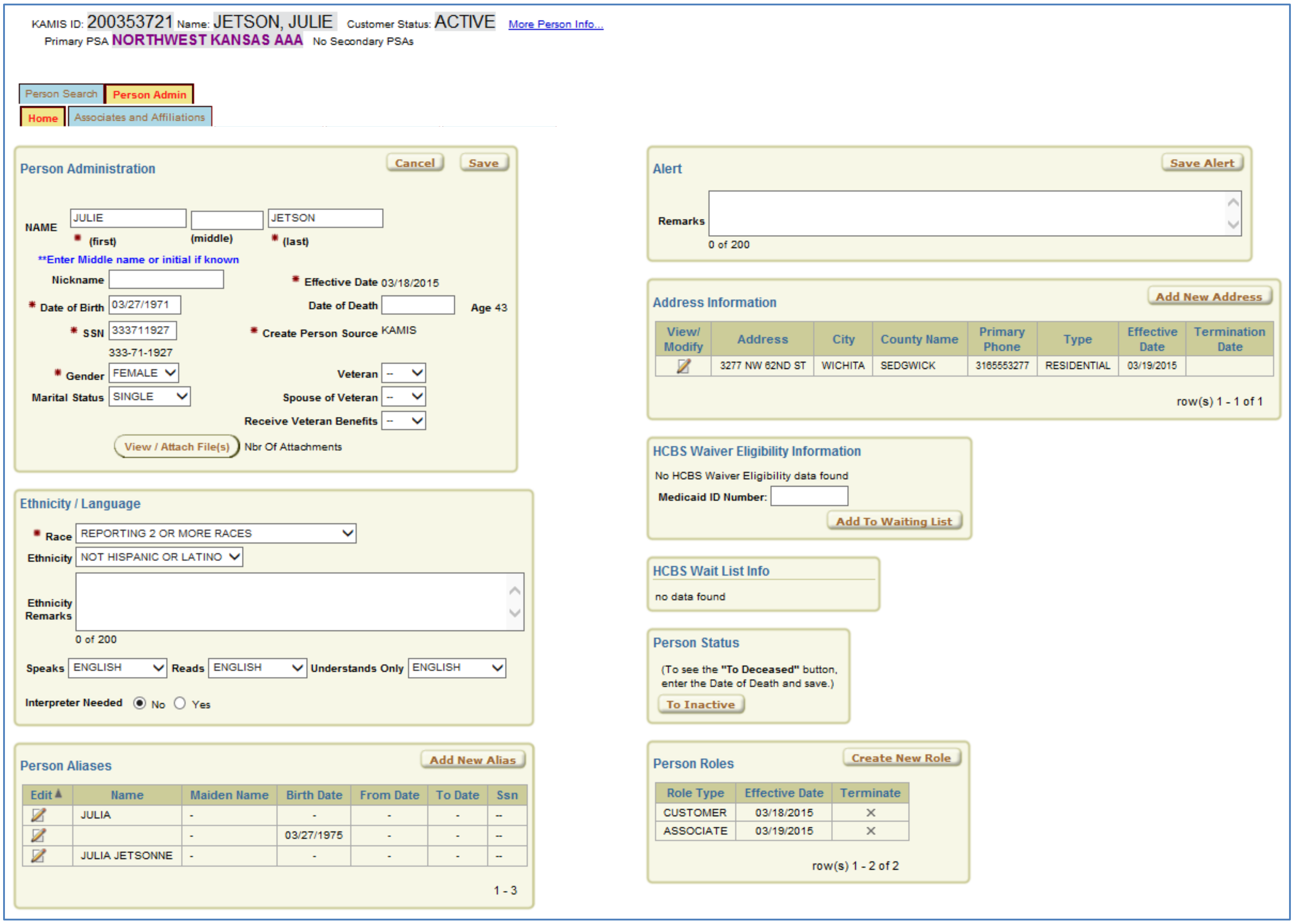
Person Aliases, continued

How to *continued*

Step	Action	Result
3.	Click on the **Create** button.	The Person Admin/Home page displays with the added alias entries in the Person Aliases table.



Completed Person Admin/Home Page



Associates and Affiliations – Overview

Introduction

An Associate in KAMIS is a person that has a personal or business relationship with another person, usually a customer, in KAMIS. Spouses, parents, case managers, and assessors are all examples of associates.

The Associates and Affiliations secondary tab of Person Admin is used to search for and add associates to a customer record. A **Listing of Associates** table displays a variety of information about each person added as an associate to the customer.

The associate must already exist in KAMIS before he/she can be added to a customer's Associates and Affiliations page. A search is performed to find the existing person record for the associate; they are then added to the Listing of Associates table of the customer.

Note: The Person Search feature in KAMIS only searches for Customer records. Only associates that are also customers will be found there.

The following instructions will deal exclusively with the Associates feature of this page.

Person Admin/ Associates and Affiliations page

A customer's Person Admin/Associates and Affiliations page, and the Associate's Person Information page, comprise the functional pages of an Associate record. Because KAMIS procedure requires looking up a person before creating the person record to avoid duplicate entries, an Associate search function is included on the Associates and Affiliations page.

Associates and Affiliations page:

Continued on next page

Associates and Affiliations – Overview, continued

Relationship Types

When adding an associate to a customer record, the associate's relationship to the customer must be provided. The Relationship Types to choose from are:

Relationship Type	
(DPOA) Durable Power of Attorney	Husband
(DPOAHCD) Durable Power of Attorney for Health Care Decisions	Landlord
Aunt	Mother
Brother	Mother-in-law
Case Manager	Neighbor
Clergy	Nephew
Conservator	Niece
Cousin	Non-Married Partners
Daughter	Non-Relative
Daughter-in-law	Other
Elderly Non-Relative	Other Relative
Elderly Relative	Relationship Missing
Employee	Self
Father	Significant Other
Father-in-law	Sister
Foster Parent	Son
Friend	Son-in-law
Granddaughter	Spouse
Grandparent(s)	Stepfather
Grandson	Stepmother
Guardian	Uncle
Housing Manager	Wife

Associate Types

In addition to assigning a relationship between a customer and an associate, an associate type must also be assigned. The Associate Types to choose from are:

Associate Types	
(DPOA) Durable Power of Attorney	Financially Responsible
(DPOA) Durable Power of Attorney for Health Care Decisions	Friend / Acquaintance
Caller / Referred By	Legal Guardian
Care Recipient	Present at Assessment
Emergency Contact	Primary Caregiver
Family Member	Primary Contact
Financial Contact	Responsible Party

Search for an Associate

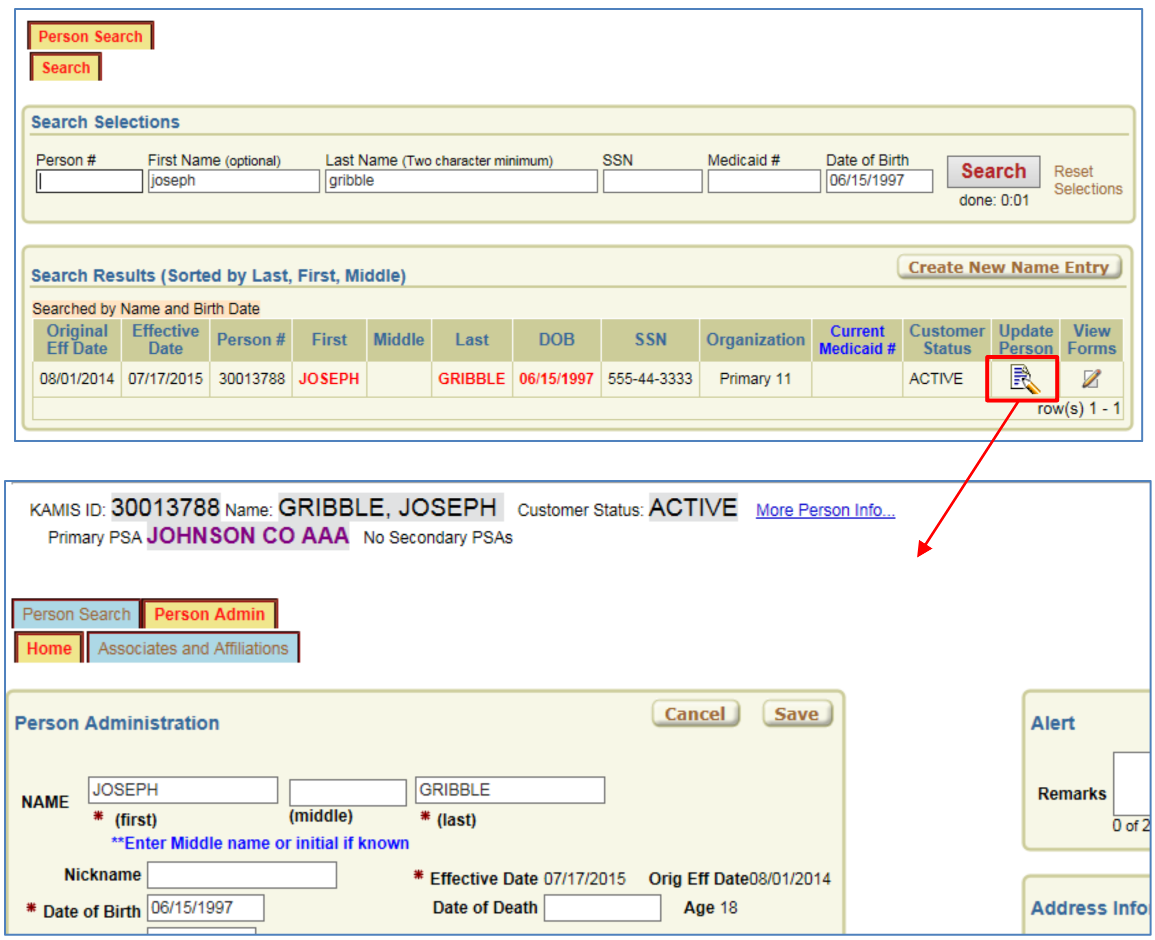
Introduction

The first step in adding an associate to a customer is to use the Associate Search fields to determine if the associate exists in KAMIS. An associate cannot be added to the Associates and Affiliations page unless his/her person record already exists.

How to

Follow the steps in the table below to search for an associate prior to adding him/her to a customer's Listing of Associates.

Step	Action	Result
1.	Perform a Person Search for the customer that the associates are being added to.	The Person Search Results displays the customer's name and other demographic information.
2.	Click on the Update Person icon to open the customer's Person Admin page.	The customer's Person Admin/Home page displays.

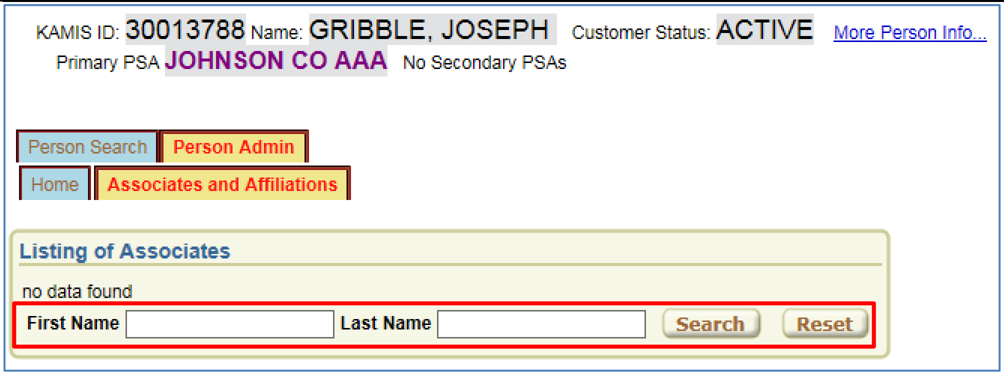
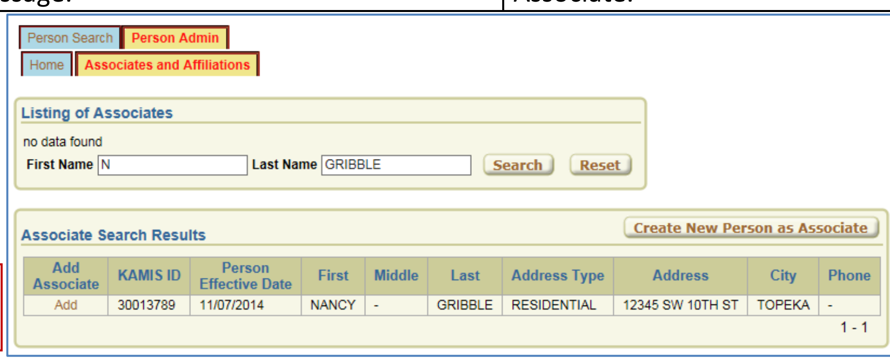


Step	Action	Result
3.	Click on the Associations and Affiliations secondary tab.	The customer's Associations and Affiliations page displays.

Continued on next page

Search for an Associate, continued

How to *continued*

Step	Action	Result
	 **Note**: This customer has no associates added yet.	
4.	Locate the Search fields at the bottom of the Listing of Associates region.	
5.	Enter the **First Name** of the associate to be added.	Optional field. Minimum one character if used.
6.	Enter the **Last Name** of the associate to be added.	This field is required, and at least the first two characters of the last name must be entered.
7.	Click on the **Search** button.	KAMIS searches for any person records matching the entry.
8.	The **Associate Search Results** will return either matching names or a 'no data found' message.	Search Results matches all types of person records (Customer, Assessor, etc.), not just Associate.
Matches Found		
No matches		

Add an Associate (Existing Person) to a Customer Record

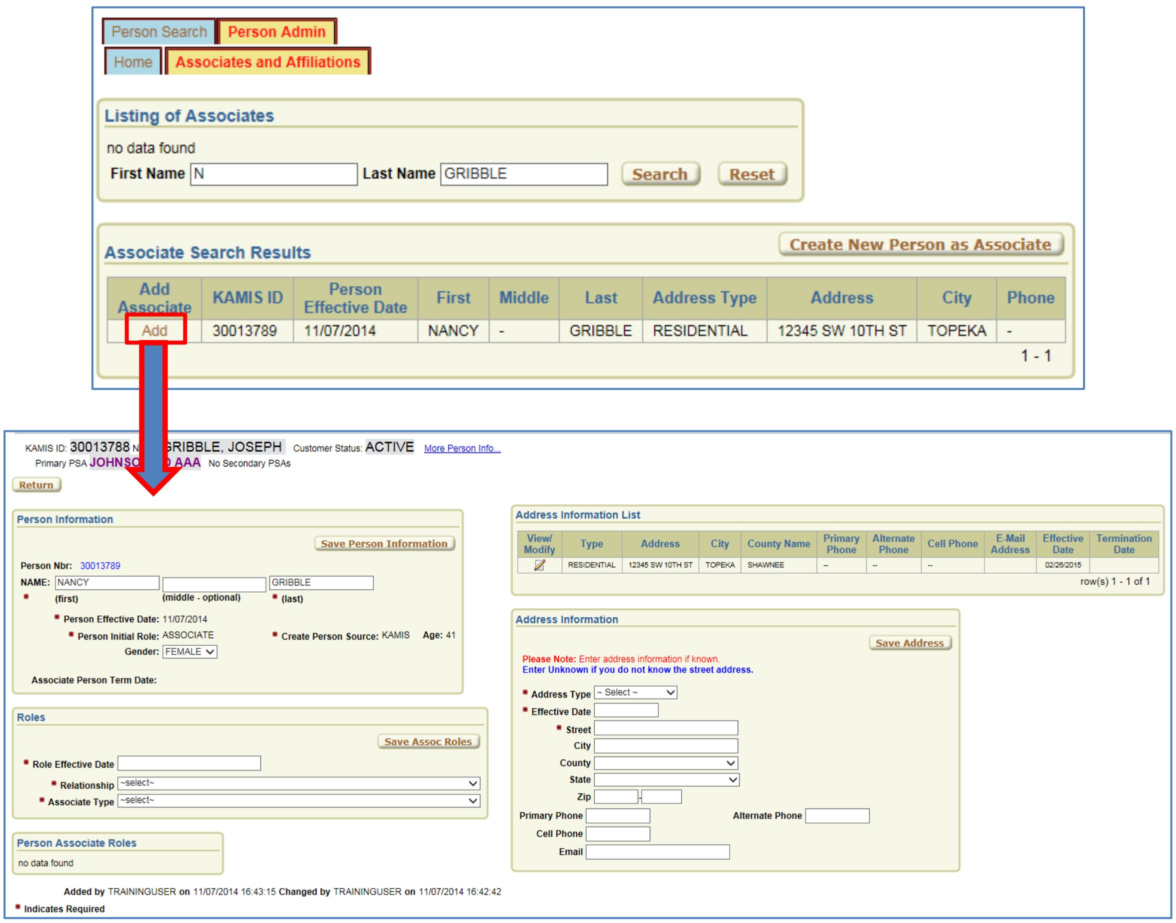
Add Associate – Existing Person Record

The steps for adding an associate differ depending on what Associate Search Results display. If the associate already exists in KAMIS, the record can simply be added to the customer's Listing of Associates.

How to

Follow the steps in the table below to add an existing person in KAMIS as an associate.

Step	Action	Result
1.	Locate the person to be added as an associate from the Associate Search Results list.	
2.	Click on the **Add** link at the beginning of the row.	The Add Associate page displays. The existing person record information displays.



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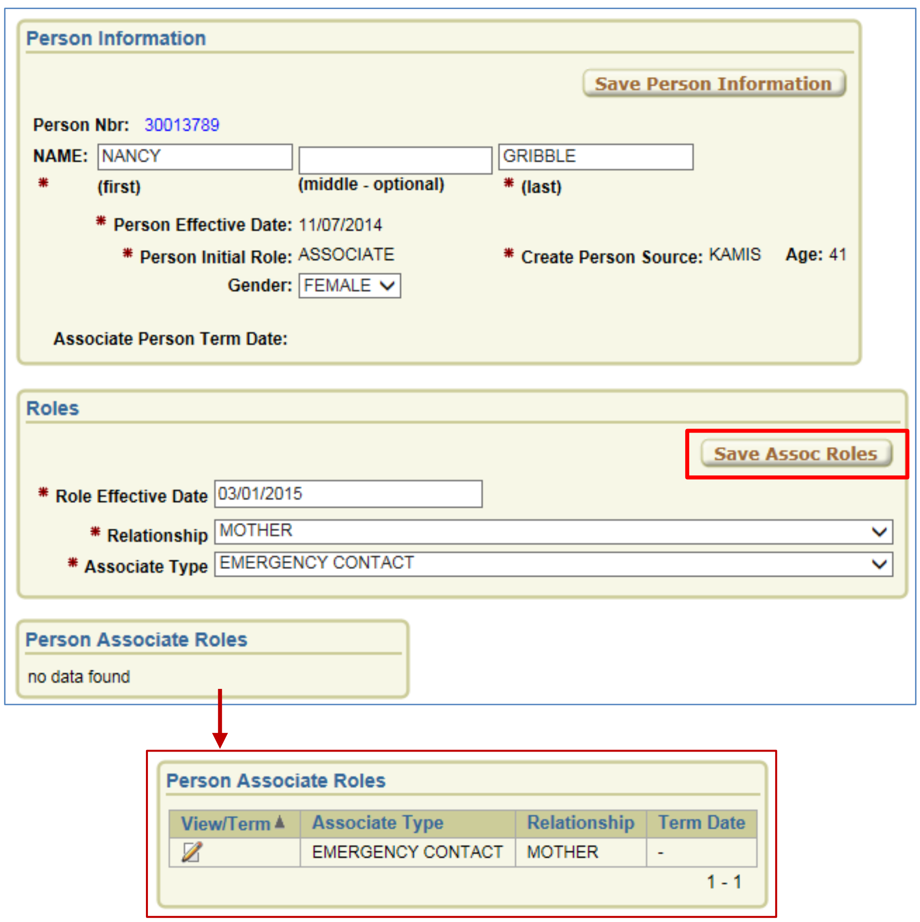
Add an Associate (Existing Person) to a Customer Record, continued

How to *continued*

Step	Action	Result
3.	In the 'Roles' region, enter the **Effective Date** of this person's association to the customer.	The Effective Date cannot be before the associate's Person Effective Date.
4.	From the **Relationship** drop-down list, select this person's relationship to the customer.	The selection displays.
5.	From the **Associate Type** drop-down list, select this person's type of association to the customer.	The selection displays.
6.	Click on the **Save Assoc Roles** button.	The new assocation is saved and the Person Associate Roles region displays the new association information for this associate.

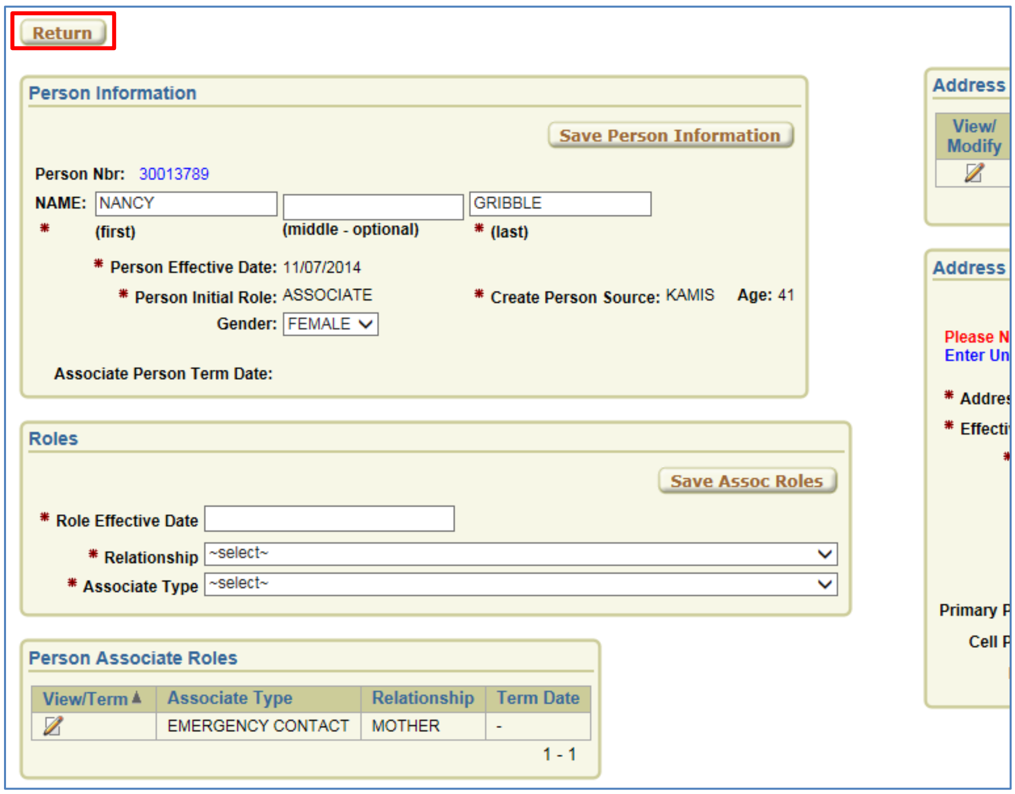


Continued on next page

Add an Associate (Existing Person) to a Customer Record, continued

How to *continued*

Step	Action	Result
7.	Click on the **Return** button.	The customer's Person Admin/Associates and Affiliations page displays, and the Listing of Associates table is updated with the new associate information.



Note: Editing the associate's address information is covered later in the Associate section of this chapter.

Add an Associate (New Person) to a Customer Record

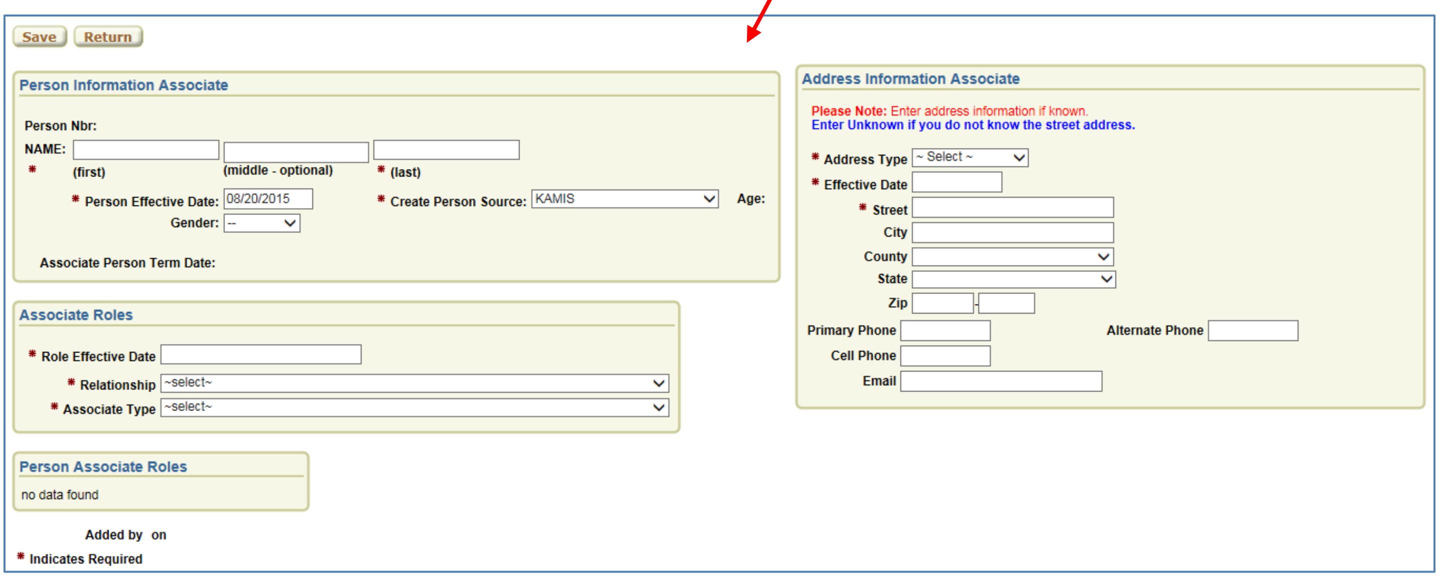
Add Associate – Create New Person

If an Associate Search results in no data found, a new person record must be created for the associate. Then the associate can be added to a customer's Listing of Associates.

How to

After doing an Associate Search and getting a 'no data found' result, follow the steps in the tables below to create a new person record with an Associate role, and then add him/her to a customer's Listing of Associates.

Step	Action	Result
1.	In the Associate Search Results region, click the **Create New Person as Associate** button.	The Person Admin page for a new associate displays.



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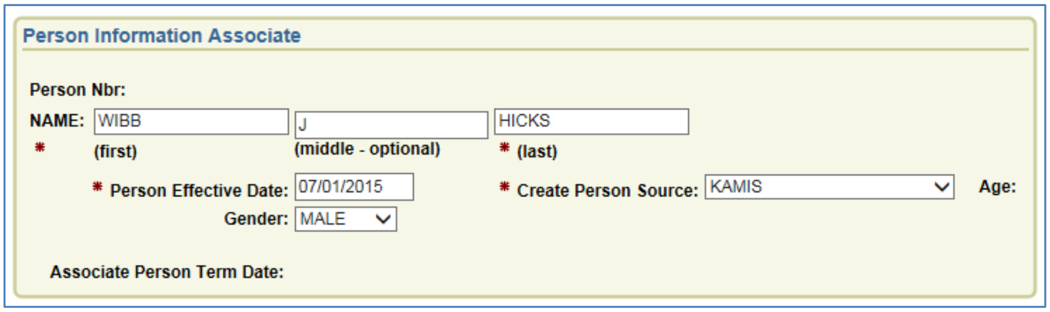
Add an Associate (New Person) to a Customer Record, continued

How to - Person Information Associate region

The Person Information Associate region is an abbreviated version of the original Person Admin/Home page.

Step	Action	Result
1.	Enter the associate's **First** and **Last** name. (Middle initial/name is optional)	Required.
2.	Enter the **Person Effective Date**.	Required.
3.	Accept the default **Create Person Source** selection of **KAMIS**.	Required.
4.	Enter the associate's **Gender** if known.	Optional.

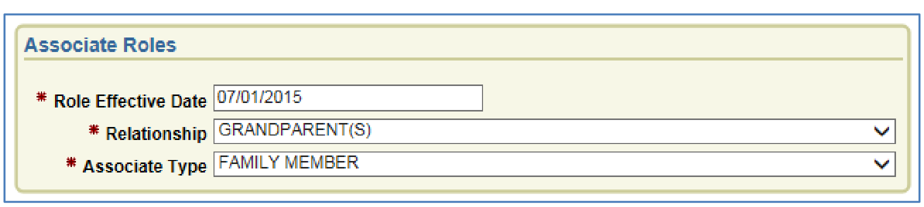


5.	Continue entry in the **Associate Roles** region.	See next table.

How to - Associate Roles region

The Associate Roles region assigns the Associate role to this person record, and identifies the specific association this person has to the customer. All fields in this region are required.

Step	Action	Result
6.	In the **Role Effective Date** field, enter the effective date for the Associate role.	Enter the date in MM/DD/YYYY format.
7.	Select the relationship of this person to the customer from the **Relationship** drop-down list.	The associate's relationship to the customer displays.
8.	Select the type of associate this person is to the customer from the **Associate Type** drop-down list.	The type of associate this person is to the customer displays.



9.	Continue entry in the **Address Information Associate** region.	See next table.

Continued on next page

Add an Associate (New Person) to a Customer Record, continued

How to - Address Information Associate region

Entering address information for an associate is not required. However, it is recommended that any known address information be entered.

If an address record is created, it must contain the Address Type, Effective Date, and Street. If the record is being created to enter just a phone number and/or email address, the Street field must still be completed, entering 'UNKNOWN' or a similar comment as necessary.

While there are three address types available in the Address Type drop-down list, only two can be used to create a new address: Residential, and Business. The MMIS/KMAP Address type is only used for new or updated addresses that come from the overnight feed from KMAP's client eligibility information, and is read only. If the MMIS/KMAP Address is selected as the address type, the address will return an error message and will not save.

If there is no address information to enter, skip to step 21 of these instructions.

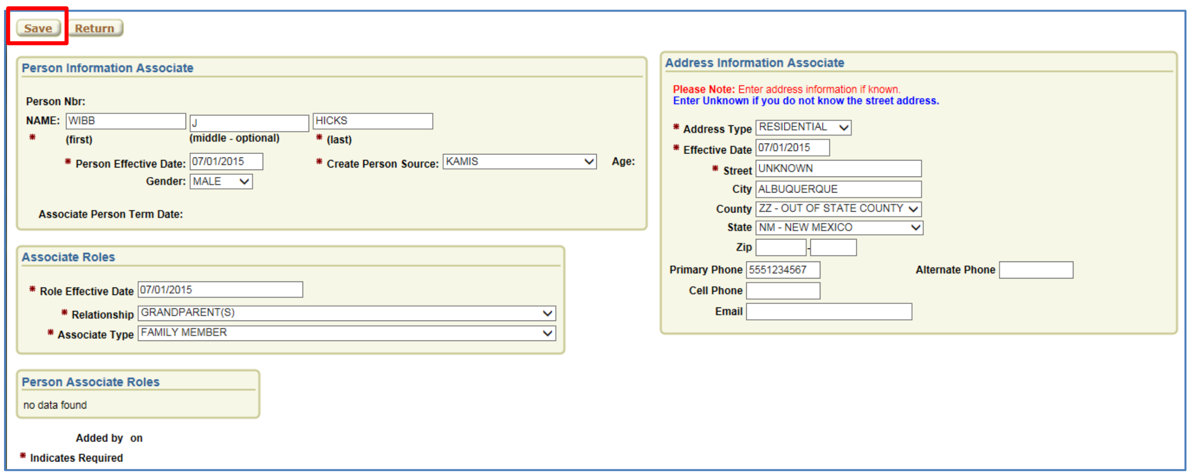
Step	Action	Result
10.	In the 'Address Information Associate' region, select the **Address Type** from the drop-down list.	Required field. Do NOT choose MMIS/KMAP Address as the Address Type.
11.	Enter the address **Effective Date.**	Required field. Enter in MM/DD/YYYY format.
12.	Enter a **Street** address, if known. If the street address is not known, enter 'UNKNOWN' or a similar indicator.	Required field.
13.	Enter the **City**.	Optional.
14.	Enter the **County** code. Note: If the address is not in Kansas, enter ZZ for the County.	Optional. When the first letter of the county is entered, a list of all counties in Kansas starting with that letter appears. Type the second letter of the county to narrow the list to a single entry. Tab to or click in the next field to continue.
15.	Enter the **State** abbreviation. Note: If the address is not in the United States, enter ZZ for the State.	Optional.
16.	Enter the **Zip** code.	Optional.
17.	Enter the **Primary Phone** number.	Optional. Enter digits only – no special characters.
18.	Enter an **Alternate Phone** number.	Optional. Enter digits only – no special characters.
19.	Enter a **Cell Phone** number.	Optional. Enter digits only – no special characters.
20.	Enter an **Email** address.	Optional.

Continued on next page

Add an Associate (New Person) to a Customer Record, continued

How to - Address Information Associate region *continued*

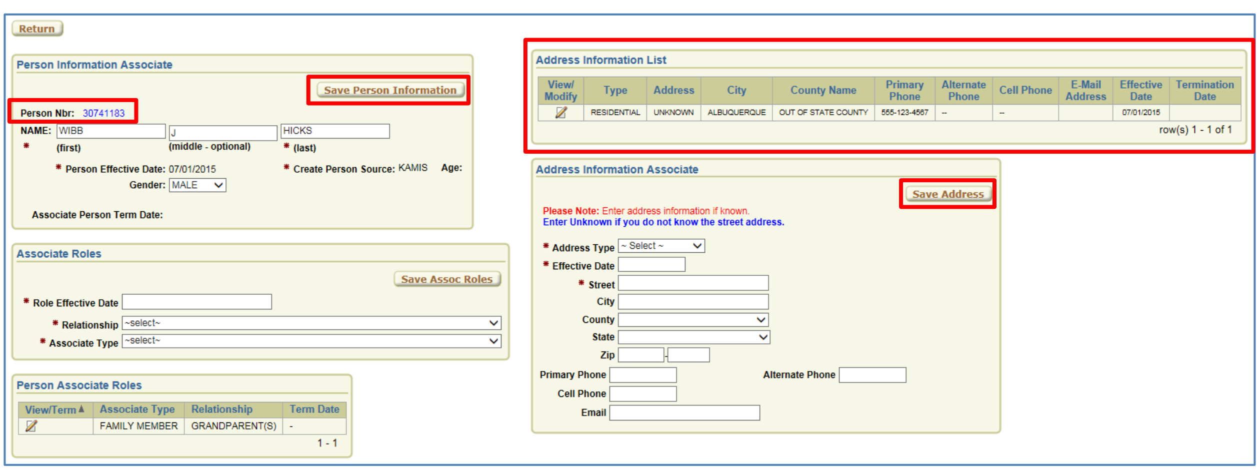
Step	Action	Result
21.	Click on the **Save** button at the top of the page.	The new Associate record is saved, and the address displays in the **Address Information List** located above the address entry region. The **Person Associate Roles** region displays this person's relationship to the customer.



See the saved record below.

Once a new Associate record has been saved, the page updates to include these new items:

- **Person Number** (KAMIS ID) is assigned to the new Associate record
- **Save Person Information** button located in the 'Person Information Associate' region
- **Save Address** button located in the 'Address Information Associate' region
- **Address Information List** region - includes any address additions, changes, and/or terminations entered, or a 'no data found' message in place of the table if there are no address entries.



Each region can now be individually saved if any additional changes need to be made.

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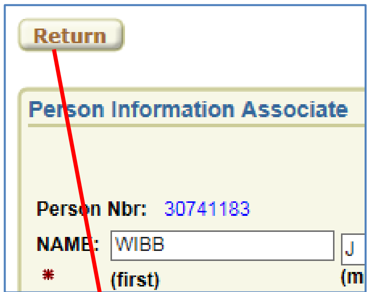
Add an Associate (New Person) to a Customer Record, continued

Return to Associates and Affiliations

Step	Action	Result
1.	Click on the **Return** button located at the top of the Associate Information page. 	The customer's Associates and Affiliations page displays. The newly created Associate record is added to the Listing of Associates table.

Edit Associate Person Admin Information

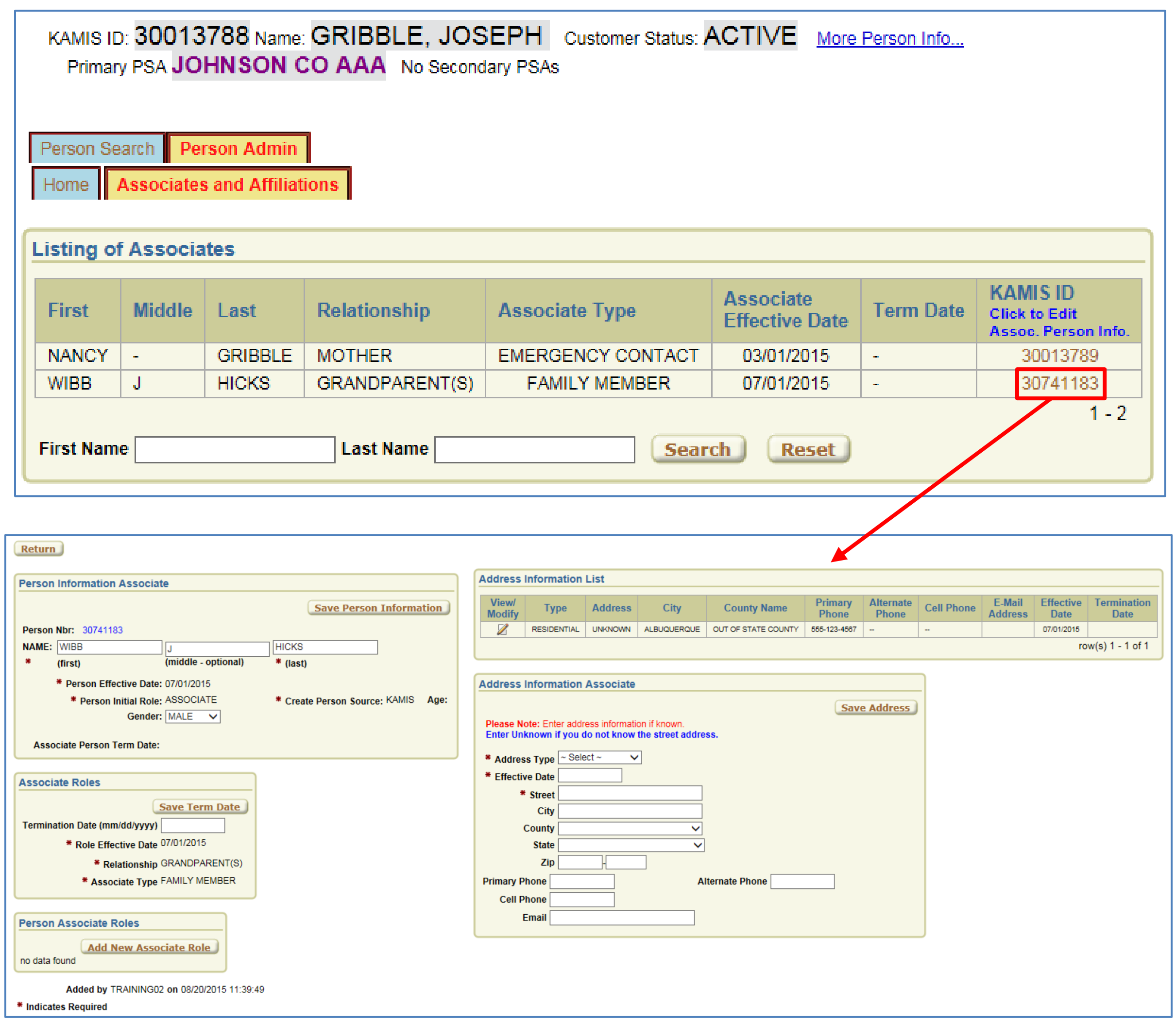
Introduction

If an associate's Person Administration information needs to be updated, it must be done via the Person Admin/Associates and Affiliations tab of the customer the person is associated with. A link is provided in the Listing of Associates table to edit the associate's Person Administration record. The associate's name and gender can be changed, his/her address can be updated, and associations/relationships can be terminated.

Edit the Person Information Associate region

Follow the steps in the table below to edit an Associate's Person Information.

Step	Action	Result
1.	Locate the Associate record in the Listing of Associates.	
2.	Click on the person number link located in the **KAMIS ID** column.	The associate's Person Information page displays.



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Edit Associate Person Information, continued

Edit the Person Information Associate region *continued*

Step	Action	Result
3.	Make the desired changes in the **Person Information Associate** region.	The name and Gender can be changed.
4.	Click on the **Save Person Information** button.	Changes made to the Person Information Associate region are saved.

Edit the Address Information List region

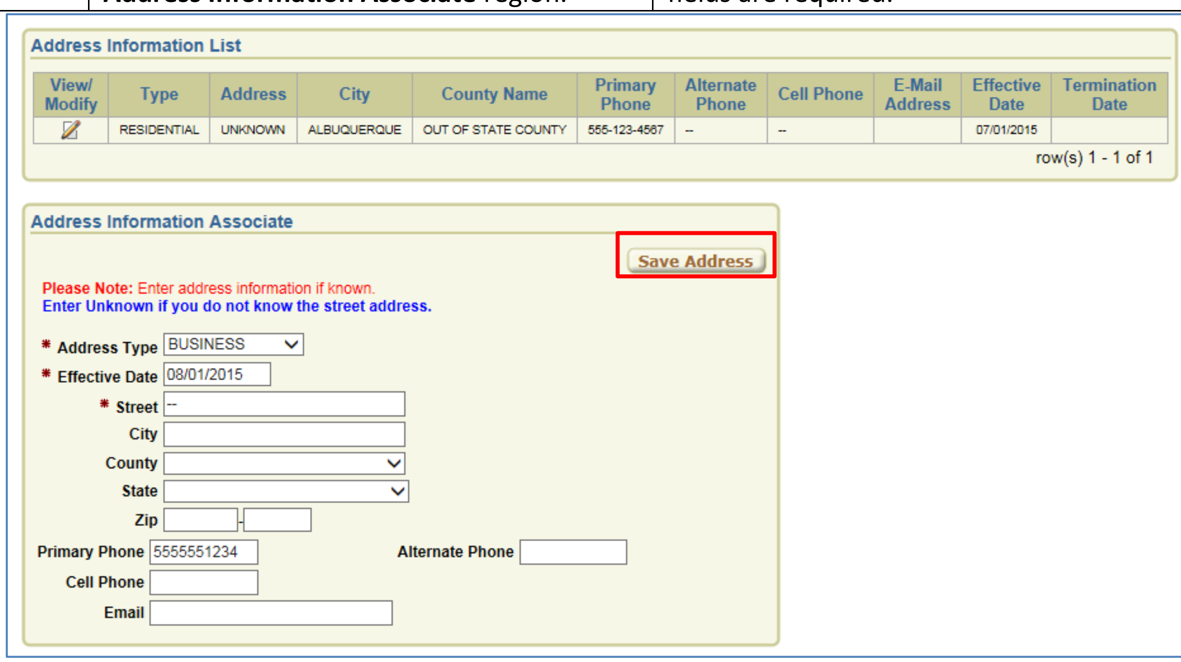
Three types of address updates can be made:

- Add a new address
- Edit/update an existing address
- Terminate an address

Add New Address

Follow the steps in the table below to enter a new address for an Associate.

Enter a New Address		
Step	**Action**	**Result**
1.	If not already open, click on the associate's KAMIS ID link to access their person information.	The associate's Person Admin page displays.
2.	Enter the new information in the blank **Address Information Associate** region.	The Address Type, Effective Date, and Street fields are required.



1.	Click on the **Save Address** button.	The Address Information List is updated to display the new address, and the Address Information Associate region clears.

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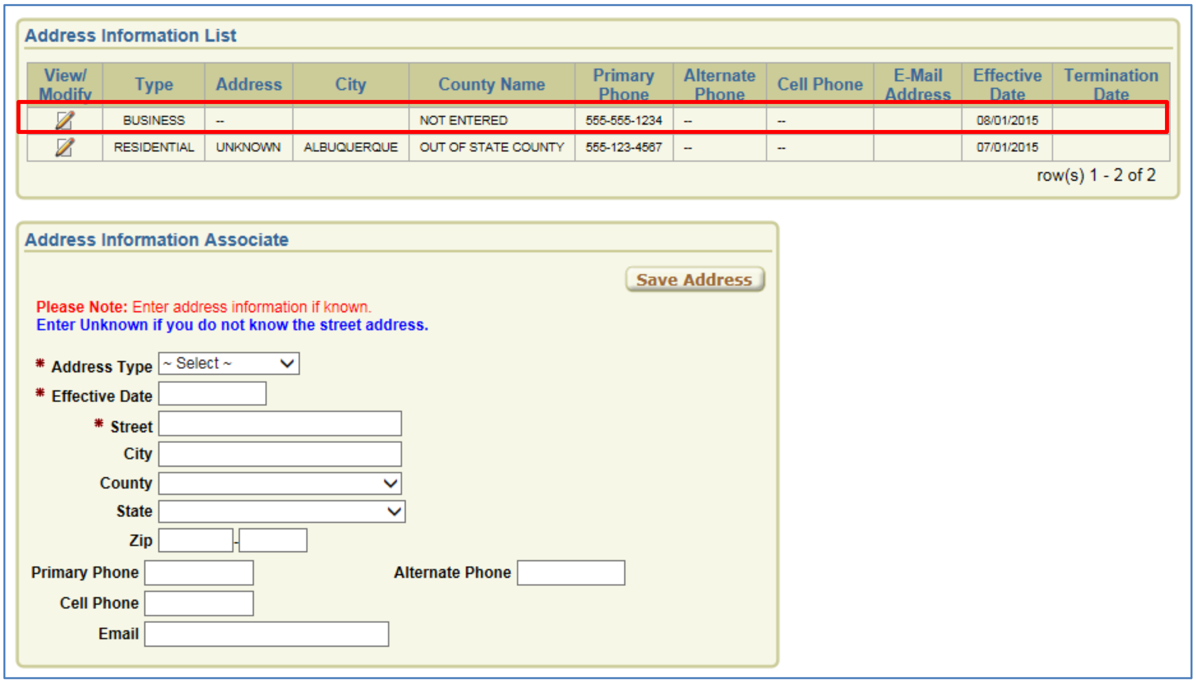
Edit Associate Person Information, continued

Add New Address

continued

Enter a New Address (continued)
New (business) address saved to the Address Information List: 

Edit/Update Existing Address

Follow the steps in the table below to update an Associate's existing address.

Update an Existing Address		
Step	**Action**	**Result**
1.	If not already open, click on the associate's KAMIS ID link to access their person information.	The associate's Person Admin page displays.
2.	In the Address Information List, click on the **View/Modify** icon of the address entry to be updated.	The Address Information Associate region populates with the selected address. **Note**: The address will not display in the Address Information List when it is being modified.
3.	Edit the address as necessary.	The Address Type and Effective Date cannot be changed. (See **Note** below)

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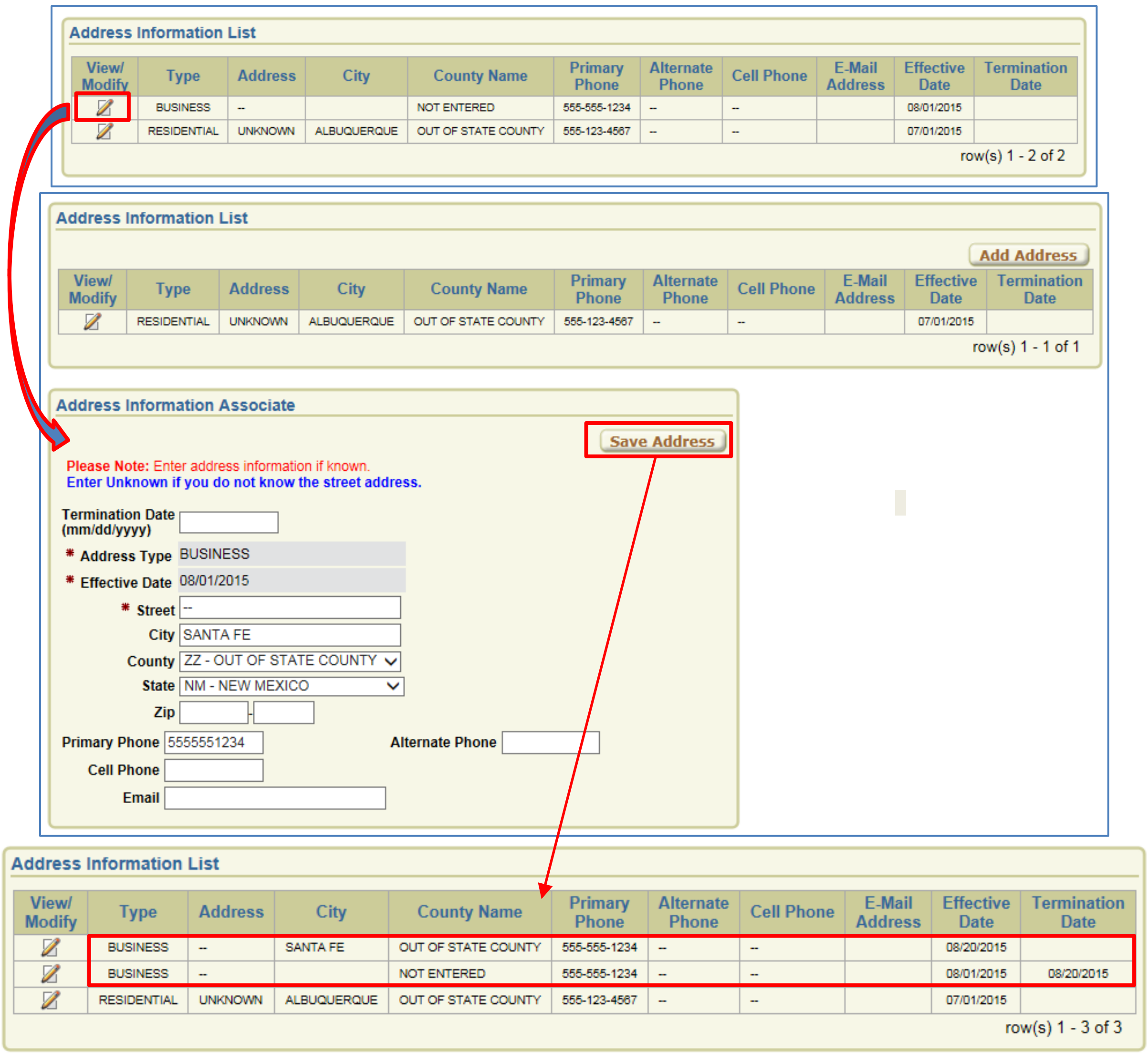
Edit Associate Person Information, continued

Edit/Update Existing Address *continued*

Update an Existing Address (continued)

Step	Action	Result
4.	Click on the **Save Address** button.	The original address is terminated and displays with the Termination Date. The updated address is added to the Address Information List as the current address.



Note: If it is determined that a new address needs to be added rather than editing the existing address, click on the 'Add Address' button in the Address Information List region to open a new blank Address Information Associate entry region.

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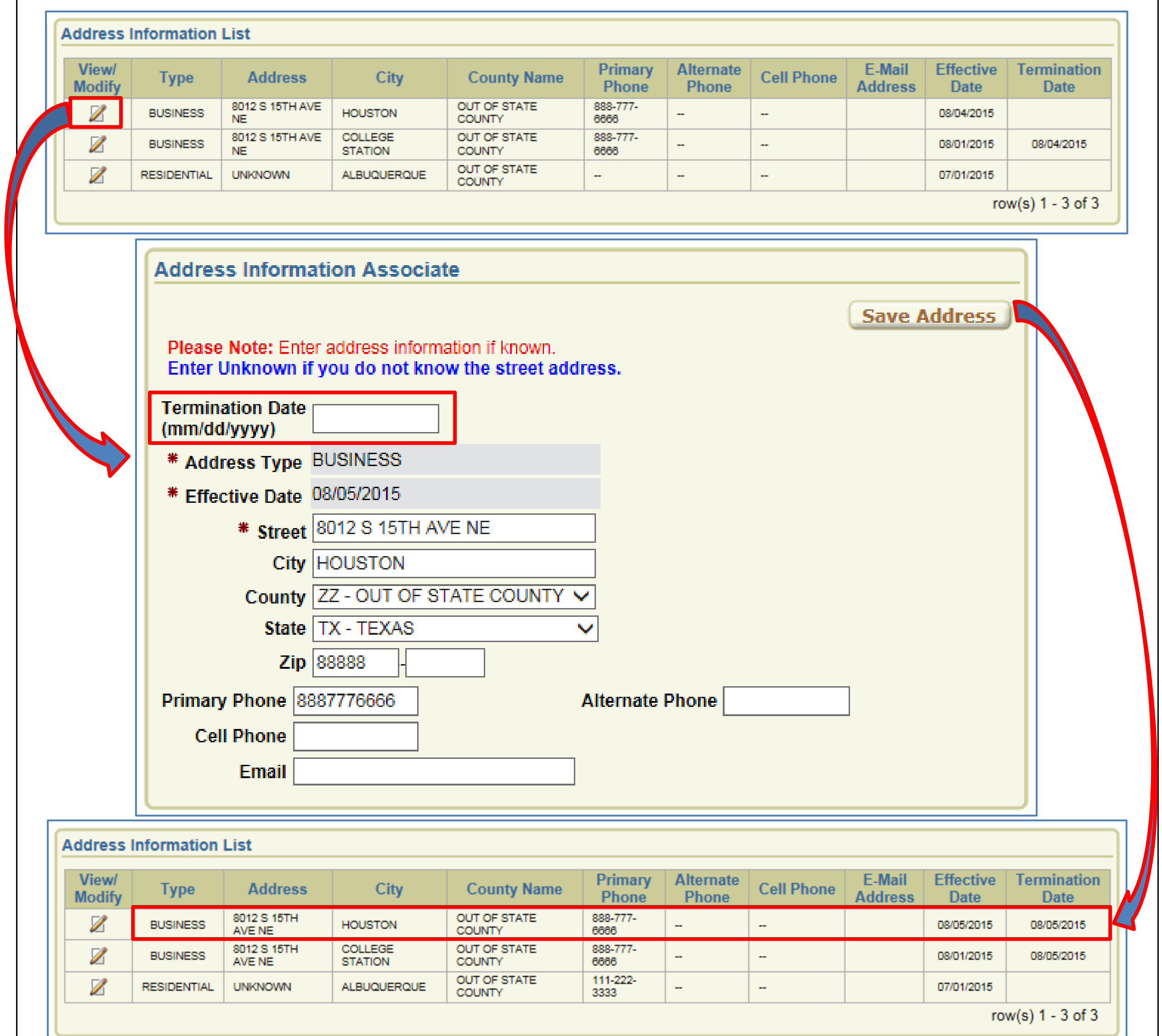
Edit Associate Person Information, continued

Terminate Address

Follow the steps in the table below to terminate an Associate's address.

Terminate an Existing Address		
Step	**Action**	**Result**
1.	If not already open, click on the associate's KAMIS ID link to access their person information.	The associate's Person Admin page displays.
2.	Click on the View/Modify icon of the address entry to be terminated.	The Address Information Associate region populates with the selected address. **Note**: The address will not display in the Address Information List while it is being edited.
1.	Enter the Termination Date of the address.	Enter in MM/DD/YYYY format.
2.	Click on the **Save Address** button.	The address is added back to the Address Information List, with the Termination Date.



Terminate an Associate and Customer Association

Introduction

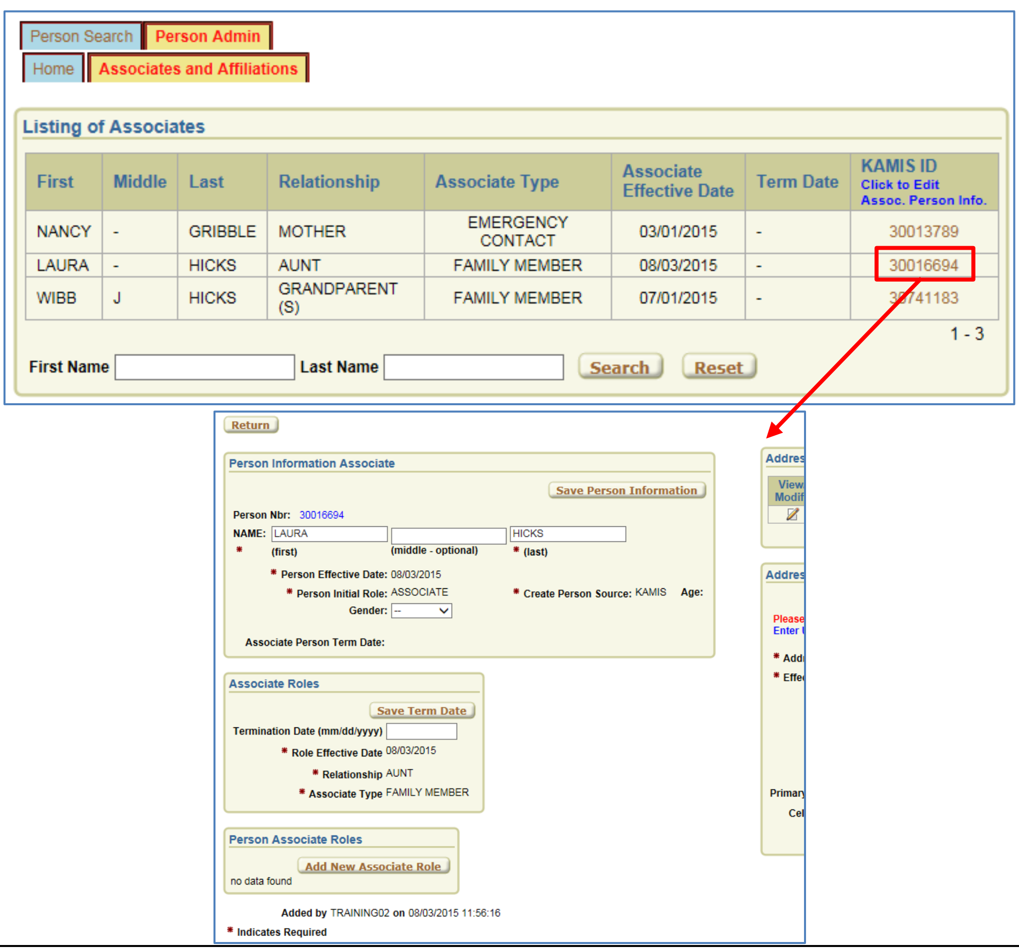
If an association between a customer and an associate is no longer valid, the Associate should be terminated from the customer's Person Admin/Associates and Affiliations page. For example, if the customer's Durable Power of Attorney (DPOA) changes, or a family member who was listed as an emergency contact dies, those associates should be terminated.

Terminating an Associate does not affect any associations they may have with other customers.

How to

Follow the steps in the table below to terminate the association between a customer and an associate.

Step	Action	Result
1.	Navigate to the customer's Person Admin/Associates and Affiliations page.	The Person Admin/Associates and Affiliations page displays.
2.	Click on the **KAMIS ID** link of the Associate to be terminated.	The Associate Person Admin page displays. **Note**: If the Associate has more than one associate type, click on the link of the one to be terminated. If all associations are to be terminated for the Associate, it does not matter which is selected.



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Terminate an Associate and Customer Association, continued

How to *continued*

Step	Action	Result
3.	Enter the **Termination Date**	Enter in MM/DD/YYYY format.

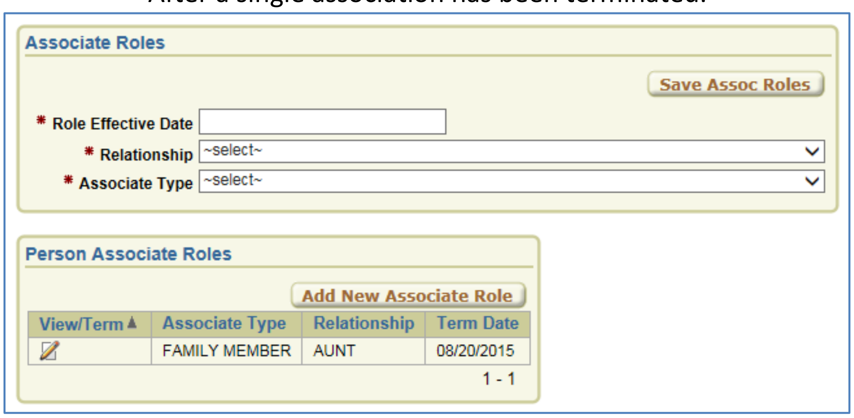
Note: Because this associate has only one Associate Role, and it is being edited, the Person Association Roles region has no additional roles to display, so the 'no data found' message displays.

Step	Action	Result
4.	Click on the **Save Term Date** button.	The association is terminated and the **Person Associates Roles** region is updated to reflect the change.

After a single association has been terminated:

Associate has no Associate Roles, so entry screen provided to add one

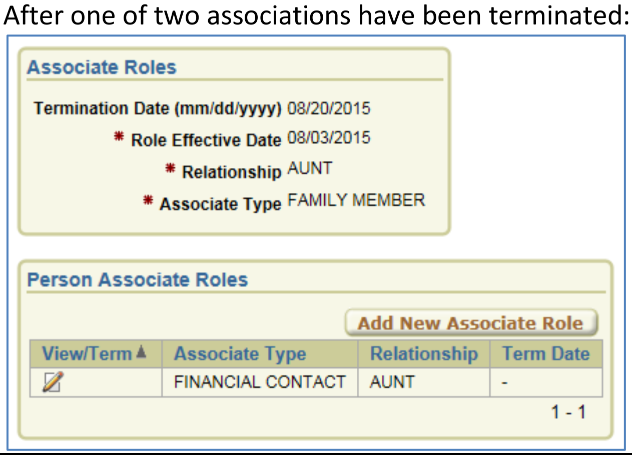
Terminated Associate Role



After one of two associations have been terminated:

Terminated Associate Role

Additional Associate Role, still active.



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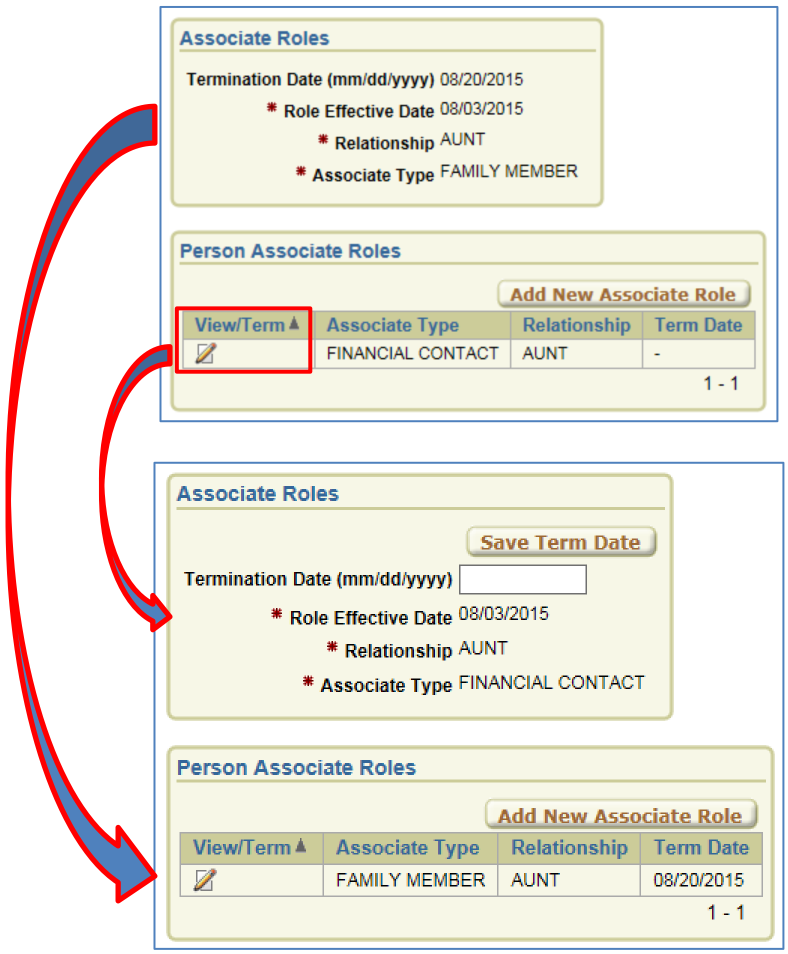
Terminate an Associate and Customer Association, continued

How to *continued*

Step	Action	Result
5.	If an additional role for this Associate needs to be terminated, click on the **View/Term icon** of the additional role in the Person Associates Roles region.	The active associate role information moves to the Associate Roles region to be updated, and the already terminated associate role moves down to the Person Associate Roles region table.



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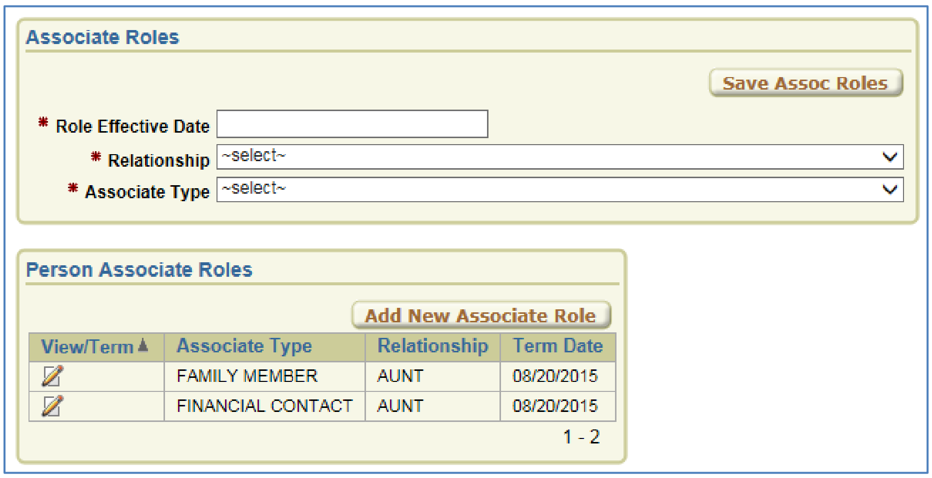
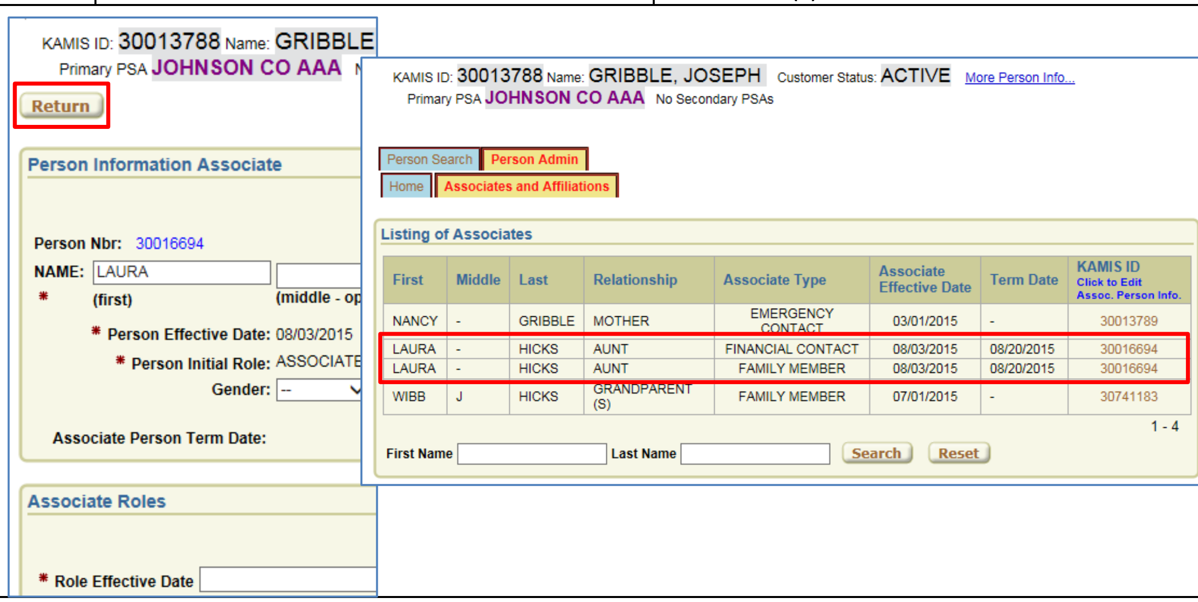
Terminate an Associate and Customer Association, continued

How to *continued*

Step	Action	Result
6.	Enter the **Termination Date** for the additional associate role and click on the **Save Term Date** button.	The second associate role is terminated, added to the Person Associate Roles region table, and a new, blank Associate Roles entry region displays (because this person now has no active associations to the customer.)



Step	Action	Result
7.	Click on the **Return** button at the top of the Associate Person Admin page.	The customer's Associates and Affiliations page displays, with the terminated associate record(s) displayed in the Listing of Associates table with the previously entered Term Date(s).



IDD Additional Info

Introduction

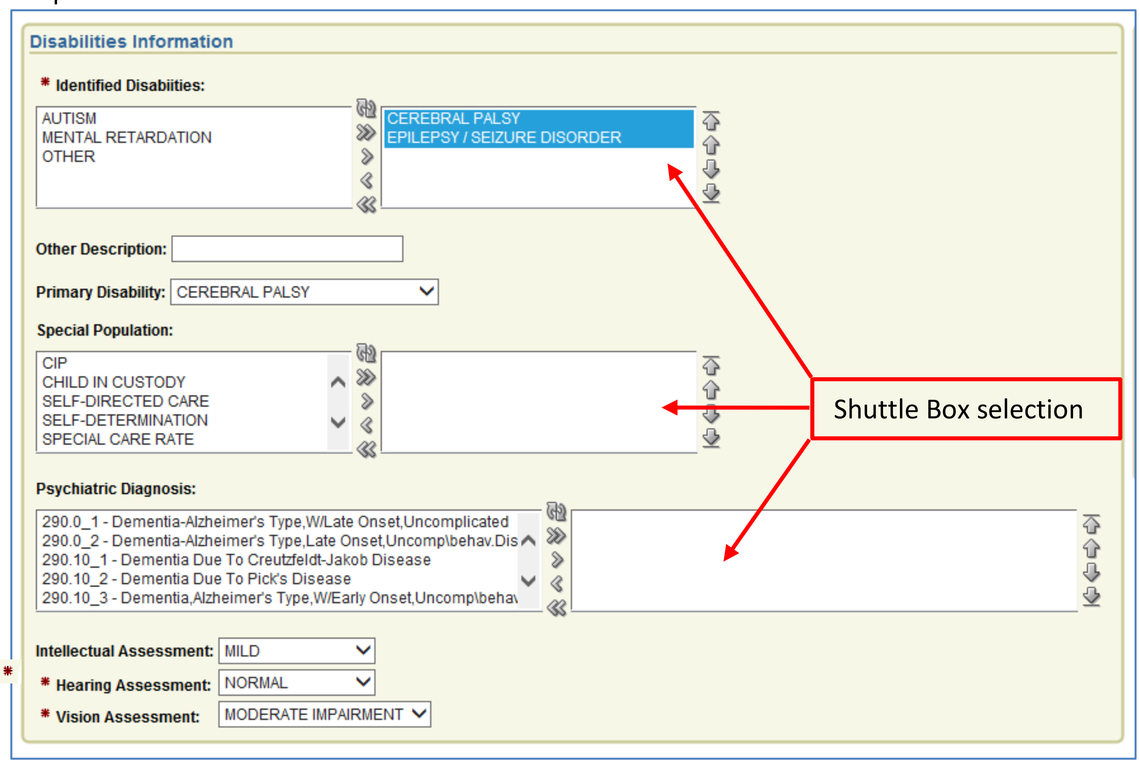
The **IDD Additional Info** secondary tab of Person Admin is only accessible by those users that have the proper security access for IDD waiver information.

Some of the information from this page also appears in the BASIS Assessment for IDD customers.

The IDD Additional Info page consists of two regions – **Disabilities Information** and **Residential & Day Program Information**. All fields marked with a red asterisk (*) are required and must be completed in order to save the page.

Disabilities Information

Example:



How to use the shuttle box to select one or more items from the list:

- Double-click on the item in the left box (not 'selected') to move it to the right box ('selected')

  OR

- Click once on the item in the left box and then click on the single select icon  to move it to the right box.

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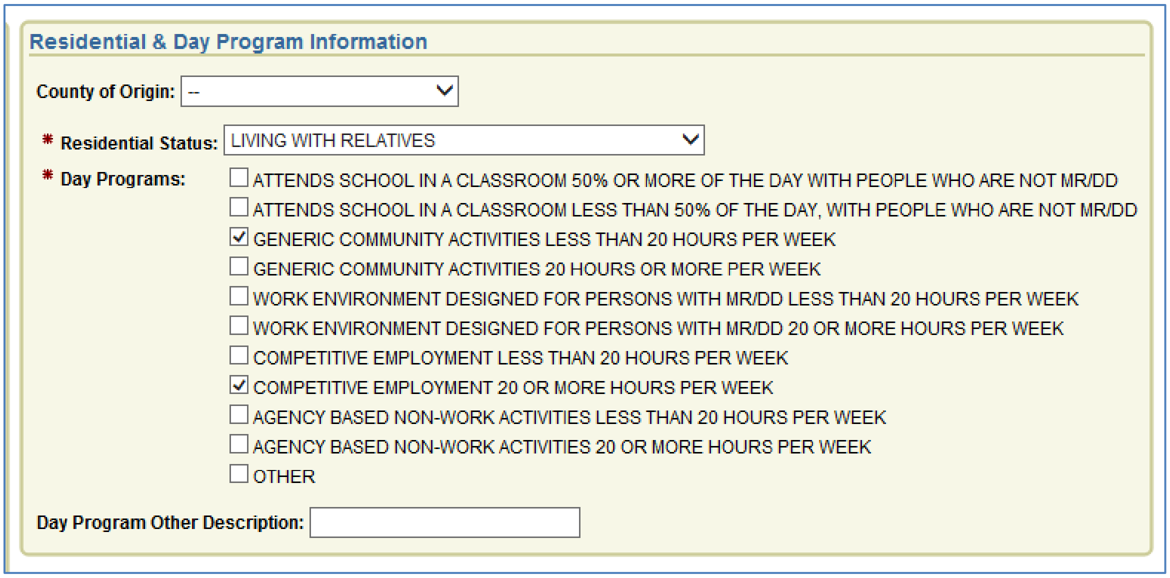
IDD Additional Info, continued

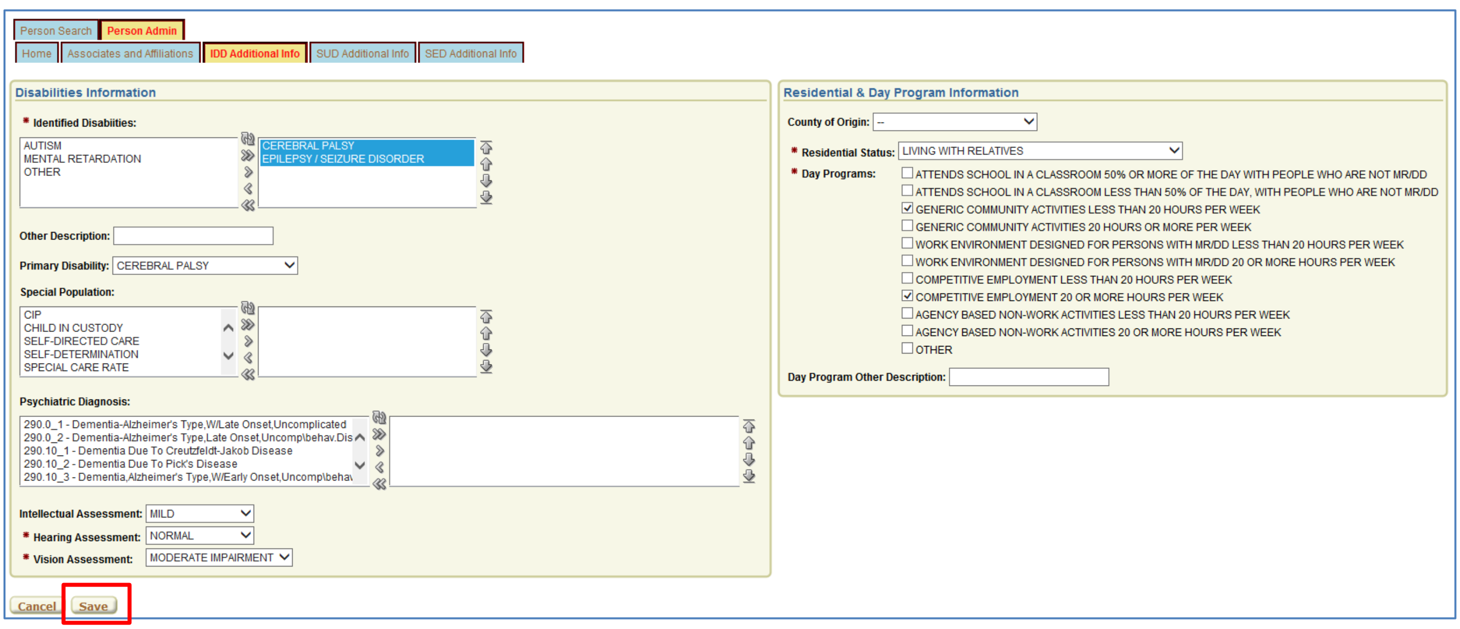
Residential & Day Program Information

Example:



Save Completed Form

After all required fields and any optional fields are completed/selected, click on the Save button to save the selections.



SED Additional Info

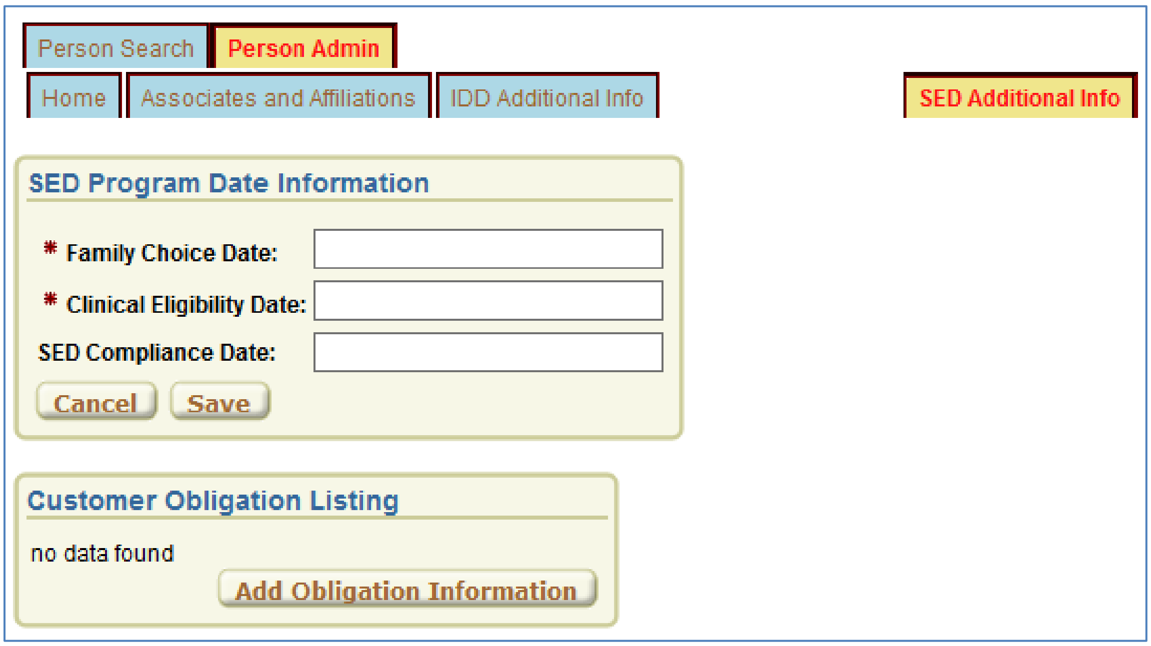
Introduction

The **SED Additional Info** secondary tab of Person Admin is only accessible by those users that have the proper security access for SED waiver information.

The **Family Choice Date** and **Clinical Eligibility Date** must be completed in order to save any SED Assessment added to the customer's forms list.

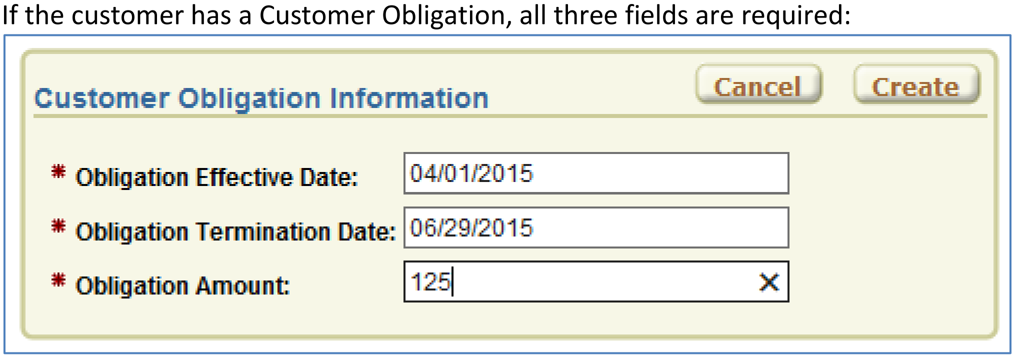
The SED Additional Info page consists of two regions – **SED Program Date Information** and **Customer Obligation Listing.** All fields marked with a red asterisk (*) are required and must be completed in order to save the page.

Blank SED Additional Info Page



Customer Obligation Listing

If the customer has a Customer Obligation, all three fields are required:



The Customer Obligation Information region has its own Create/Save button. The Obligation Amount should be entered in whole numbers. If a decimal amount is entered, the number will be rounded to the nearest dollar when the obligation information is created (saved.)

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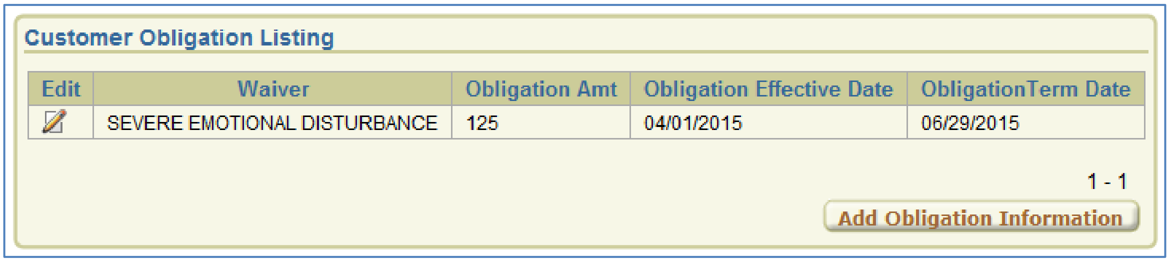
SED Additional Info, continued

Customer Obligation Listing, ***continued***

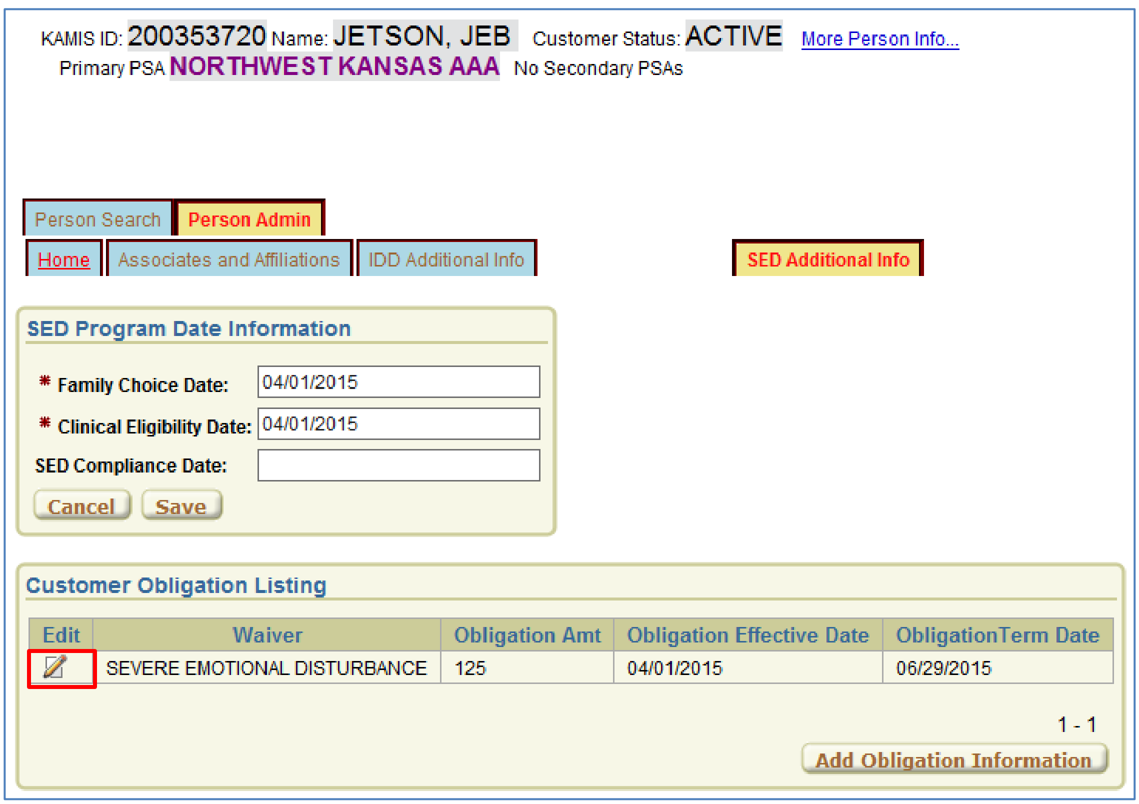
After the Customer Obligation information has been created (saved), the **Customer Obligation Listing** region shows the information in a table.



Edit Customer Obligation

Follow the steps in the table below to edit a saved Customer Obligation:

Step	Action	Result
1.	If not already there, navigate to the customer's **Person Admin/SED Additional Info** page.	The SED Additional Info page displays, with the Customer Obligation Listing table containing the customer obligation record.



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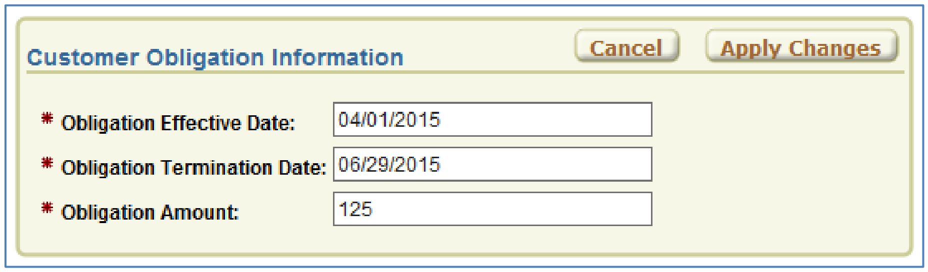
Edit Customer Obligation

continued

Step	Action	Result
2.	Click on the Edit icon next to the obligation to be updated.	The **Customer Obligation Information** change page displays.



Step	Action	Result
3.	Make the desired changes.	
4.	Click on the **Apply Changes** button.	The changes are saved and the SED Additional Info page displays with an 'Action Processed' message at the top of the page. The updated customer obligation displays in the Customer Obligation Listing table.